

# Journal

VOLUME III NUMBER I // 2015



Your Professional Guide to Winning Business



TWO PERSPECTIVES OF  
PROPOSAL MANAGEMENT

THE ART OF CREATING  
PREFERENCE

UP YOUR ANNUAL BID  
MANAGEMENT REPORT  
GAME

CLEARING UP THE BID  
CLARIFICATION PROCESS

LEAPING OVER THE HURDLES  
OF SUPPLIER CHANGE

## *Global Proposal* SMARTS

SUREFIRE WAYS TO EXPAND YOUR CULTURAL INTELLIGENCE



# Problem Solved. (Period)



SM&A<sup>®</sup>

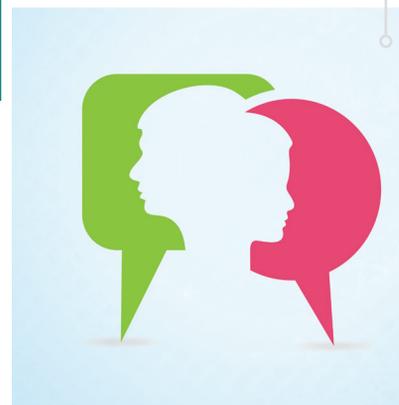
18400 Von Karman Avenue, Suite 500  
Irvine, California 92612-0506 USA  
Telephone: +1 949-975-1550 [info@smawins.com](mailto:info@smawins.com)



## Cover Story 34 //

### GLOBAL PROPOSAL SMARTS

Enhancing your CQ (cultural intelligence) is more than just knowing faux pas and traditions. It's the difference between a professional win and a multicultural victory.



## Features

### 42 // FACEOFF: TWO PERSPECTIVES OF PROPOSAL MANAGEMENT

In-house proposal managers and outside consultants have very different proposal prep strategies. Which way is best for a win?

## Stages

### CAPTURE

#### 10 // STEP BY STEP: IMPROVING PWIN WITH A CAMPAIGN

#### 11 // STRATEGY: THE ART OF CREATING PREFERENCE

### BUSINESS DEVELOPMENT

#### 12 // BEHAVIORAL SCIENCE: CUSTOMER ANALYSIS

#### 14 // EXPANSION: DEVELOPING RELEVANCE IN COMMERCIAL BUSINESS

#### 16 // PROCESS IMPROVEMENT: GET MORE FROM YOUR ANNUAL BID MANAGEMENT REPORT

### GRAPHICS + PRODUCTION

#### 18 // PERCEPTIONS: THE BENEFITS OF INFOGRAPHICS

### PROPOSAL MANAGEMENT

#### 22 // SCIENCE: QUANTIFYING QUALIFICATION

#### 24 // PREPAREDNESS: ASKING THE RIGHT QUESTIONS

## Commercial

### 26 // THE HIGH JUMP: LEAPING OVER THE HURDLES OF SUPPLIER CHANGE IN COMMERCIAL PROPOSALS

## Federal

### 30 // THE WORKFLOW: PRIORITIZING AND ASSIGNING FEDERAL PROPOSAL RESOURCES

## In Every Issue

#### 04 // FROM APMP'S EXECUTIVE DIRECTOR RICK HARRIS

#### 06 // FROM APMP'S CEO SUZANNE JONES

#### 46 // BOOK REVIEW

#### 48 // IMPRESSIONS: A TRIBUTE TO STEVE JENSEN

## CONSULTANTS UNITE — THIS IS WHY WE HAVE THE APMP PIC

**W**hen a U.S. federal agency attaches language to an RFP that could prohibit APMP members from earning, we must stand up to right the perceived wrong. This is happening with the Department of Veterans Affairs (VA) (RFP) No. VA118-15-R-0558, November 19, 2014, for information technology (IT) services.

The VA states, “... the RFP expressly prohibits offerors from using consultants to assist them in preparing their sample task responses. *Id.* at 119. In this regard, the RFP requires an offeror to certify, using a form provided with the RFP, that its sample task responses were prepared only by the offeror and its subcontractors, provided that any such subcontractor has entered into a contractor team arrangement (CTA) with the offeror and is identified in the offeror’s management proposal. *Id.* The RFP provides that the agency will not consider proposals which do not include the certification or which provide a falsified certification.”

The GAO also denied a protest filed by Advanced Communication Cabling Inc. (ACC) in Michigan that challenged the VA “no contractor” stipulation and cited it as unfair to a small-to-medium-size company. ACC said the stipulation inhibits its ability to compete.

This only applies to task responses: Consultants may be used on other parts of the proposal, and this is a small part of a larger proposal. However, something trivial can grow into something more restrictive.

The VA wants to confirm whether the company’s team submitting the task response can articulate technical aspects of the RFP and communicate how it will handle the project, without a consultant’s help. APMP disagrees with the VA’s language and intent. Virtually all of APMP’s 6,200+ members, consultants, or those who have hired consultants, are impacted by the VA language.

Will this become precedent? How many other agencies will follow the VA’s lead, eliminate consultants from their task orders, or worse, potentially larger parts of a proposal?



CONSULTANTS ARE BROUGHT IN TO HELP SUBJECT MATTER EXPERTS (SMEs) ARTICULATE A MESSAGE REGARDING GOVERNMENT SOLUTIONS AND MAKE IT EASIER TO PICK THE BEST PROVIDER

This is a significant issue for these reasons:

1. It does not promote collaboration between industry and government or encourage the best proposal submission—two hallmarks of APMP PIC’s mission.
2. Every company should be able to employ whomever they wish to produce the best proposal.
3. It discriminates against small-to-medium companies that routinely hire consultants.
4. It will impact veteran-owned consulting businesses—an entire group of consultants we’re sure the VA had no intention of turning its back on.

Consultants are brought in to help subject matter experts (SMEs) articulate a message regarding government solutions and make it easier to pick the best provider.

APMP’s Procurement Improvement Committee (PIC) advocates for all APMP members and is on Capitol Hill educating and informing the House and Senate Small Business Committees professional staff, the Senate Committee on Homeland Security and Government Affairs, and the Senate Veterans Committee. We are showing them how this decision negatively impacts our industry members, asking questions and offering positive solutions. We will report on our progress.

On behalf of all members, we intend to exercise that right and will report on our progress. If you would like to comment on how this language has hampered your business, please email me.

**RICK HARRIS, CF APMP**  
Executive Director

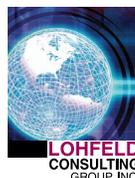
+ [rick.harris@APMP.org](mailto:rick.harris@APMP.org)

# WinCenter™

Finally—a single, integrated  
Capture & Proposal tool that will  
help you win more new business  
and increase your win rate...

**Powered by CorasWorks and SharePoint, WinCenter™ provides the competitive edge you need to manage your business.**

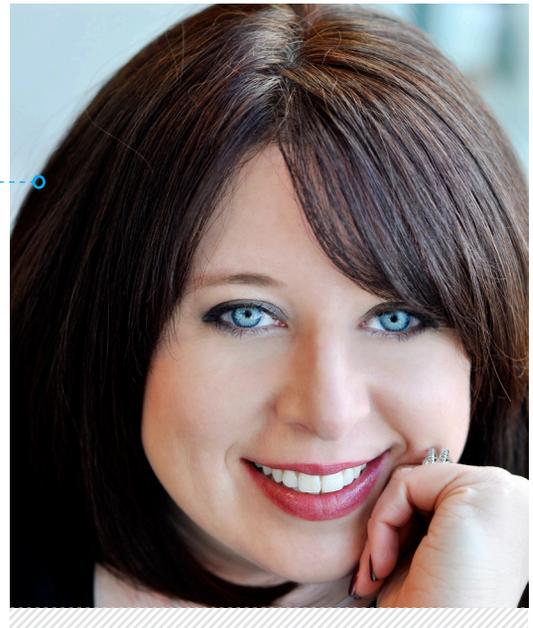
- Provides a central, web-based portal with dashboard visibility across all capture and proposal activities
- Drives the process, standardizes it enterprise-wide, and measures progress
- Guides you every step of the way with a toolkit of instructional materials and sample templates
- Provides a collaborative workspace for each opportunity—you never have to leave WinCenter™ to get all your work done
- Includes a central, enterprise-accessible Asset Library for easy access to key knowledge management resources
- Integrates with external CRM, opportunity management, and other systems and information
- Provides built-in document co-authoring and review
- Lets you easily manage opportunities, action items, documents, artifacts, graphics, résumés, reporting, and reviews—all from a single location
- Fully self-customizable and tailorable to fit your processes, jargon, and culture



For more information and to schedule your WinCenter™ demo, contact Tom Gorman at 443.534.8204 or [TGorman@LohfeldConsulting.com](mailto:TGorman@LohfeldConsulting.com)

For more information about our Go-to-Market, pipeline development, capture, and proposal consulting services, contact Brent Hunt at 703.300.5652 or [BHunt@LohfeldConsulting.com](mailto:BHunt@LohfeldConsulting.com)

[www.LohfeldConsulting.com](http://www.LohfeldConsulting.com)



# THE SKY IS THE LIMIT

“GROWTH IS NEVER BY MERE CHANCE; IT IS THE RESULT OF FORCES WORKING TOGETHER.” —JAMES CASH PENNEY, FOUNDER OF JCPENNEY

**T**hese are exciting times for our association. Having just surpassed 6,000 members, we are making history as we continue to grow and make our mark all around the world. As APMP’s CEO, I am focusing my attention on member value and growth in 2015. Meeting this 6,000-member mark is just the first of many milestones we are positioned to reach.

APMP provides more value to its members than ever before. In January, our association launched an improved Body of Knowledge, an online wiki-style collection of research-based resources and templates for APMP members, representing industry best practices in a universal language, and will soon release to members a new Professional Development Career Path for individual and organizational growth. APMP continues to offer certification opportunities and supports various committees aimed at increasing awareness of our profession and strengthening our industry.

I am privileged to lead as we invest in our members and build our professional footprint. Being a member of APMP has had a tremendous impact on my career, and I

am passionate about being the worldwide organization that proposal and business development professionals recognize and depend on.

Register today for our annual APMP Bid & Proposal Con to spend a few days away from the office, networking and strengthening your professional profile.

Let’s make 2015 a remarkable year for APMP. Get involved in your local chapter, volunteer as a presenter, join a committee, submit an article, attend events, recruit new members ... The sky is the limit.

**SUZANNE JONES, CP APMP**

Chief Executive Officer

+ [suzanne.jones@apmp.org](mailto:suzanne.jones@apmp.org)

# Journal

**APMP Executive Director**  
Rick Harris, CF APMP

**EDITORIAL**

**Editor in Chief**  
Patrice D. Scheyer  
**Executive Editor**  
Kelly Crane Winkler  
**Senior Editor**  
Melanie Bracey  
**Managing Editor**  
Lori B. Racey  
**Copy Editor**  
Carmen M. Walsh  
**Editorial Coordinator**  
Jordan Kell

**DESIGN**

**VP Marketing**  
Jack Davidson  
**Graphic Designer**  
Deborah Sharpe

**PRODUCTION**

The YGS Group  
3650 West Market Street  
York, PA 17404  
Phone 717-505-9701  
Fax 717-505-9713  
+ [www.theYGSgroup.com](http://www.theYGSgroup.com)  
+ [APMPJournal@theYGSgroup.com](mailto:APMPJournal@theYGSgroup.com)  
**Account Director**  
Tina Enck

**ADVERTISING**

Patrice D. Scheyer  
+ [patrice.scheyer@APMP.org](mailto:patrice.scheyer@APMP.org)  
703-281-1686

Printed in the USA. Copyright ©2015 by the Association of Proposal Management Professionals (APMP). All rights reserved. The *APMP Journal* is published biannually by APMP, P.O. Box 77272, Washington, D.C. 20013-7272. Material in this publication must not be stored or reproduced in any form without permission. Permission and reprint requests should be directed to + [APMPJournal@theYGSgroup.com](mailto:APMPJournal@theYGSgroup.com). The *APMP Journal* is produced in the USA. Digital subscriptions come with APMP membership, available at + [www.APMP.org](http://www.APMP.org).

Please visit the APMP website + [www.APMP.org](http://www.APMP.org) for additional information about the *APMP Journal*, including viewable PDF files of advertisements and articles. Please submit article ideas to the editors of *APMP Journal* at + [APMPJournal@theYGSgroup.com](mailto:APMPJournal@theYGSgroup.com).

**APMP BOARD OF DIRECTORS**

**APMP Executive Committee, 2015**

- Chief Executive Officer  
Suzanne Jones, CP APMP  
Northrop Grumman
- Chief Operating Officer  
Nicolas Adams, CF APMP  
Teradata UK Ltd.
- Past CEO  
Colleen Jolly, CPP APMP Fellow  
24-Hour Company

**APMP Directors, 2014–2015 Term**

- Robin S. Davis, CF APMP  
Metre
- Kristin Dufrene, CPP APMP  
Fellow  
Engility Corporation
- Lisa Haas, CF APMP  
The Matky Group
- Janneke Orriens, CF APMP  
Strategic Proposals NL

**APMP Directors, 2015–2016 Term**

- William Boggs, CP APMP  
Boeing
- Ginny Carson, CF APMP  
Proposal/Bid Consultant
- Gillian Dionne, CP APMP  
General Dynamics Information  
Technology
- Ken Erskine, CP APMP  
John Sisk & Son Limited
- Kelson Forsgren, CF APMP  
Shipley Associates
- Krystn Gull, CP APMP  
Burns & McDonnell
- Robert Lohfeld, CF APMP  
Fellow  
Lohfeld Consulting
- Lee Manthei  
SM&A Consulting
- Jamie Ninneman  
SAP
- Neil Philipson, CP APMP  
Mott MacDonald PDNA
- Sonya Wooley, CF APMP  
Mammoth Technologies LLC

Contributors to *APMP Journal* hold their own points of view that may not be representative of the “APMP Body of Knowledge,” an online wiki-type resource, which is the association resource for industry best practices.

## Let Shipleys help you navigate the *new normal*

- International offices in 14 countries
- Online training—Learn from anywhere
- Staff augmentation on capture and proposal efforts
- Turnkey proposal outsourcing



Politics

Budget  
Constraints

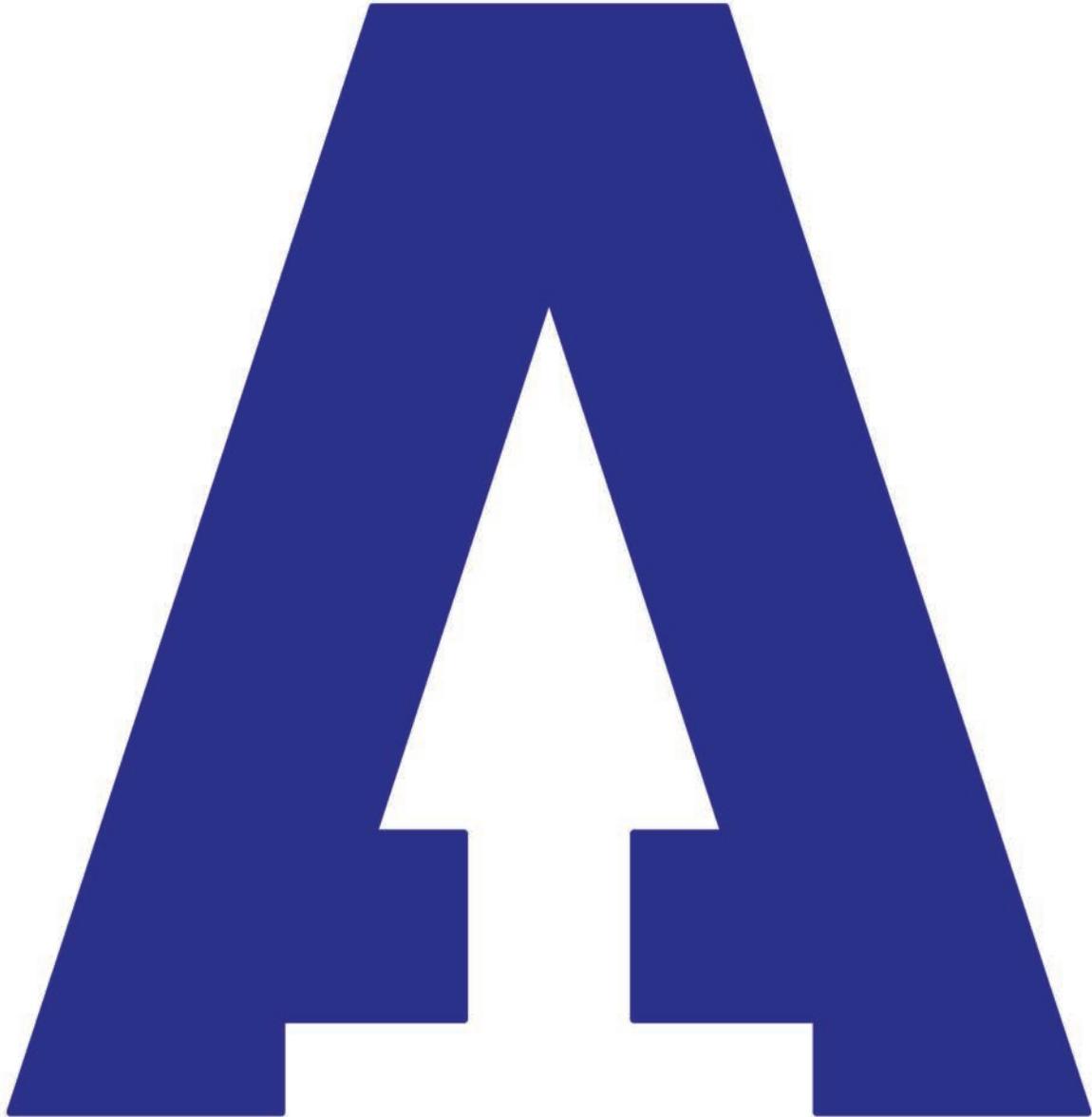
New  
Decision-  
Makers

Advanced  
Technology

New  
Competitors

**WHAT IS YOUR  
NEW NORMAL?**

**Challenge yourself a little more  
- *each time* - *every proposal!***



**Accelerate Inc.**

**“Accelerate Provides Us With The Special Forces...”**  
*Proposal Center Manager, Fortune 500 Client*

[www.Accelerate-Inc.com](http://www.Accelerate-Inc.com) • [info@Accelerate-Inc.com](mailto:info@Accelerate-Inc.com) • 949.500.0527

© Copyright 2015 Accelerate Inc. All Rights Reserved.

# 5 stages

**C** CAPTURE

**BD** BUSINESS DEVELOPMENT

**GP** GRAPHICS + PRODUCTION

**PM** PROPOSAL MANAGEMENT

10 //

## CAPTURE

The art of early-stage identification and qualification of new business

12 //

## BUSINESS DEVELOPMENT

The practice of implementing reliable planning and statistically sound data in order to deepen long-term value propositions and relationships with customers and markets

18 //

## GRAPHICS + PRODUCTION

The process of designing and combining images, words, and specific treatments to effectively convey information

22 //

## PROPOSAL MANAGEMENT

The coordination and oversight of all elements of the proposal development life cycle from capture to win

# Improving PWin with a Campaign

## SETTING THE CONDITIONS FOR A SUCCESSFUL CAPTURE

By Robert Johnston

**CAPTURE SUCCESS IS** measured by the amount of new business won with customers. Success at discrete, individual capture events does not in itself guarantee that success. A campaign delivers a more systematic, disciplined, and “holistic” approach—linking strategy, tactics, messaging, and proposal activities while simultaneously shaping and positioning the acquisition to increase the probability of win (PWin).

General definitions of capture include “to gain control of or exert influence over” and “to take possession of, as in a game or contest.” A definition of campaign is “a systematic course of aggressive activities for some specific purpose.” Too often proposal professionals focus only on the specific elements of the capture in front of them (e.g., exerting influence over the customer’s specific written requirements to qualify their product). A campaign approach takes a much broader view of the acquisition, customer, political environment, budget, operational need, and many other factors. In a campaign, you look beyond the customer and consider the many factors that might affect your successful pursuit of the acquisition.

The use of a campaign approach for captures fits nicely within the business development life cycle phases described in the APMP Book of Knowledge (BOK). The following table, adapted from “Proposal Process Tailoring” in the BOK, provides some example capture actions taken in a campaign.

### A Campaign Approach Will Improve PWin

Business Development Life Cycle Phase	Campaign Phase	Example Activities
1. Market Identification	Shaping	<ul style="list-style-type: none"> <li>Assess political support for the acquisition</li> <li>Identify customer stakeholders and decision makers at all levels, internal and external to the customer organization</li> <li>Look across customer, company, and market boundaries to identify and assess multiple capture synergies</li> </ul>
2. Account Planning and Positioning	Shaping	<ul style="list-style-type: none"> <li>Position the offering across multiple organizational levels to identify customer advocacy and disconnects</li> <li>Target key decision makers early to identify supporters and opponents of the product, service, and company</li> <li>Shape and position political considerations at the local, state, and national levels</li> </ul>
3. Opportunity Assessment	Shaping	<ul style="list-style-type: none"> <li>Assess competitors across markets, customers, and as previous teammates</li> <li>Look at past performance across the board</li> <li>Look at other capture opportunities now and in the future for synergy or distraction</li> </ul>
4. Opportunity Planning	Capture	<ul style="list-style-type: none"> <li>Look at all levels of the customer community for financial stability, critical needs, hot buttons, issues, and biases</li> <li>Look broadly at portfolio management across multiple captures and multiple markets for synergy or distraction</li> <li>Consider available R&amp;D resources, teammates, and suppliers to support multiple capture efforts</li> </ul>
5. Proposal Planning	Capture	<ul style="list-style-type: none"> <li>Where possible, validate proposal-planning efforts against any last-minute customer requirements, funding issues, or political constraints</li> <li>Use the campaign efforts to continually update the opportunity strategy</li> </ul>
6. Proposal Development	Capture	<ul style="list-style-type: none"> <li>Continue to shape, position, and sustain program advocacy with the customer, teammates, and suppliers</li> <li>Closely monitor outside factors that may affect proposal viability (e.g., funding, advocacy, political considerations)</li> </ul>
7. Negotiation and Post-Submission Activity	Capture	<ul style="list-style-type: none"> <li>Campaign personnel should fully support the proposal team (e.g., respond to customer questions, reinforce and maintain the customer’s trust, be prepared to provide recommendations to optimize the deal)</li> </ul>
8. Delivery and Ongoing Customer Relationships	Keep It Sold/Protect	<ul style="list-style-type: none"> <li>Continue to assess political, financial, and operational or technical support for the award</li> <li>Interact with customer stakeholders and decision makers at all levels, internal and external to the customer organization, to maintain advocacy for the product, service, or program</li> <li>Look across customer, company, and market boundaries to identify and assess products, services, or activities that can bring additional value to the customer</li> </ul>

A CAMPAIGN APPROACH TAKES A MUCH BROADER VIEW OF THE ACQUISITION, CUSTOMER, POLITICAL ENVIRONMENT, BUDGET, OPERATIONAL NEED, AND MANY OTHER FACTORS. IN A CAMPAIGN, YOU LOOK BEYOND THE CUSTOMER AND CONSIDER THE MANY FACTORS THAT MIGHT AFFECT YOUR SUCCESSFUL PURSUIT OF THE ACQUISITION.

Consider looking beyond a normal capture approach focused on discrete actions and events. Start thinking in a broader frame of reference for the entire acquisition environment. Shape and position every possible factor to increase your proposals' PWin. ●

**Robert Johnston** is managing director of NorthWest Strategic Consulting LLC, offering consulting for campaigns, captures, and acquisition strategy. He can be reached at + [nwstratconsult@gmail.com](mailto:nwstratconsult@gmail.com).

## STRATEGY

# The Art of Creating Preference

## BE THE ONE PEOPLE WANT TO WORK WITH

By Michael Cameron

**CAPTURE PLANNING IS** a key element in every guide, tutorial, how-to, and training manual devoted to winning government contracts. The overwhelming majority of capture planning discussions are focused on what to do: internal and external analysis, strategy development, positioning, building relationships with your customers, and so on. Many discussions are centered on competing on your strengths: by making the right investments in capabilities and people to create a compelling solution, by crafting a strategy that emphasizes the capabilities of your team and the key features and benefits of your solution, and by getting to a win-win RFP with your customer.

These are all reasonable considerations; however, the guiding principle of all of this effort is, at best, only implied. Capture planning (and, by extension, capture execution) is “the process of ... implementing winning



strategies to capture a specific business opportunity by influencing the customer to prefer your organization and solution.” Now we’re getting somewhere: A key objective of capture planning is to create preference. Here’s why preference matters.

In *Winning Behavior, What the Smartest, Most Successful Companies Do Differently*, authors

Terry Bacon and David Pugh ask, “How do you outperform competitors who are as capable as you are and who sell essentially the same products you do, the same way you do, to the same set of customers?” In other words, what makes your offer stand out from the pack? The authors go on to provide their answer: “By the time customers are seriously



considering you, they know you can do the work. The question for them isn't 'Who can do the work?' The question is 'With whom do we want to work?'"

In any competitive procurement, the customers who write the requirements for the solicitation and the customers who compose the source selection team usually have a view of the industry base that supports them. They have history with some companies and know of others by reputation. This creates an expectation of which companies are in the pool of bidders from which the winner is likely to emerge. Given technical solutions and prices that are similar in merit, the source selection decision often comes down to a confidence factor—in other words, a preference for one bidder over another. There are usually a number of well-qualified companies—so the final decision criterion often comes down to preference

for a business model, corporate culture, leadership style, and other intangible characteristics.

Preference is also a key factor in choosing prospective team partners, regardless of whether you are looking for a prime or subcontractors. On a level playing field with no strong incumbent, many potential primes have similar capabilities and propose similar solutions (after all, everyone is responding to the same requirements), so the decision of who to team with comes down to selecting a business model and core values that instill a greater level of confidence. In any case, the decision is often based on preference.

Preference also applies to satisfying internal stakeholders and decision makers. A key objective in any capture is developing a win strategy that simultaneously maximizes the potential for an award and all, or at least most, of the business objectives of the

prime contractor. As the capture manager, you are dealing with the preferences of your corporate stakeholders and decision makers and have to develop your win strategy accordingly.

Creating preference is, therefore, a fundamental objective for any capture. In addition to marshalling the efforts of solutions architects, cost analysts, and a host of other technical and functional experts, a capture manager has to understand what customers, teammates, and internal stakeholders prefer to buy, join, or approve—and then make sure they get it. ●

---

**Michael Cameron** is vice president and director of business development at Leidos for assurance, integration, and manufacturing. He has 23 years of experience in operations and business development, including capture of large, complex technical programs. He can be reached at [+ cameronmj@leidos.com](mailto:cameronmj@leidos.com).

## BEHAVIORAL SCIENCE

# Customer Analysis

## A CRITICAL PART OF SETTING A PRICE TO WIN

By Michael O'Guin



To win, you must **differentiate your solution from the competition** based on what is most important to the customer. Ensure you understand your customer's priorities and what your competitors will offer.

**DEVELOPING AN ACCURATE** price to win (PTW) requires an analyst to look at the opportunity from two perspectives—how the customer will buy and how the competitor will bid. This article addresses the critical role customer analysis plays in setting the PTW.

Just like competitors, customers have patterns of behavior. Procurement departments and executives tend to have longevity and follow the same procedures from one purchase to the next, resulting in behavioral norms. As a result,

customers usually have consistent buying behaviors. Identifying these behaviors is of strategic importance, yet few companies conduct even an elementary analysis of how customers actually buy.

Examining a customer's buying patterns offers insight into a customer's true value decision when making selections. For example, while the U.S. Coast Guard claims to always buy "best value," a look at its buying history over the last 15 years reveals it has selected the bidder with the

lowest price in every case. Once the Coast Guard even chose the lowest bidder despite its technical evaluation team determining that the winning shipyard was incapable of building the proposed ship. NASA, on the other hand, which also claims to award on “best value,” consistently awards to low-risk or higher performing technical solutions—and NASA will pay a premium for its preferred choice. It is crucial to identify your customer’s behavior so that you can design your bid with the most desirable cost trade-off for that customer. Likewise, you need to know how your competitors will bid; if your competitors are sophisticated, they might bid differently with different customers.

The customer analysis focuses on understanding how and why the customer has made similar source selection decisions. The first step is to identify appropriate precedent purchases. (It is important to note here that it is always better to have a few good data points than many bad ones.) An appropriate precedent purchase is one with similar characteristics to the purchase you are assessing. For example, customers use different criteria and have different concerns when selecting a contractor for a development job versus a production or service job. Large and mission-critical purchases are selected differently than custodial services. Once the precedent programs are identified, an analyst researches each one. Did the customer pick the lowest price or pay a price premium? Why did the customer pick the winner—greatest capability, lowest risk, or fastest schedule? Who were the key customer decision makers, and what roles did they play? Did the customer rigidly adhere to its rules, or was the customer flexible? As you accumulate answers to these questions, you will uncover patterns that can guide your win strategy.



A bidder can see an interesting pattern when examining the Australian Ministry of Defense’s (MOD) selection behavior. The MOD always likes to have three bidders and uses the three players as leverage against each other in lengthy negotiations before announcing a winner. The Ministry often goes with someone other than the lowest price bidder, such as on the Lead-In Fighter, F-18, P-3 Upgrade, and Penguin Missile programs. When the MOD intends to select a higher priced offering, it tends to behave consistently: It defines and interprets the requirements to disqualify the low-cost offerings as noncompliant. Knowing this, a shrewd supplier can discern where a competition is going by watching how the MOD is evolving the requirements. More importantly, this knowledge can help you develop a plan to shape the competition toward your offering.

The customer analysis helps determine where your price needs to be relative to the competition. To win a U.S. Coast Guard procurement, you must bid lower than any other competitor; however, when selling to NASA, the winning price depends on how desirable your offering is. The more desirable your offering relative to the competitors’, the greater price premium you can justify. Conversely, if the competition’s offering is more desirable, you must be much lower in price. Understanding the customer is critical to setting a winning price and avoids “leaving money on the table.” ●

---

**Michael O’Guin** is owner of Knowledge Link, and author of *Winning the Big Ones: How Teams Capture Large Contracts* and *The Complete Guide to Activity-Based Costing*. He can be reached at + [moguina@aol.com](mailto:moguina@aol.com).

# Developing Relevance in Commercial Business

## ACHIEVING SUCCESS WITH A PROCESS

By Tracie Bretecher, CF APMP



### MAKING THE CLIENT A PRIORITY IS THE FIRST STEP TO A WIN. CONSIDER THESE DETAILS IN YOUR NEXT PROPOSAL:

The client's name should appear **two to three times more** than your company name. This is one way of demonstrating the client is more important than you.

Make your company's beliefs and feelings fact. Saying your company believes, feels, thinks, etc., a certain way is irrelevant. If your organization believes it has the better solution, **just say, "We have the better solution."**

If not directed otherwise in the RFP, **put the solution to the client's needs first.** If they have a need to reduce spending, detail first how your solution is cost-effective. If they have a need to increase customer satisfaction, show how your solution meets that goal.

FOR ONE CANADIAN IT company, this was its struggle: It was growing fast—50 percent growth year over year for the first 10 years—and RFPs were starting to come in. It had a documentation specialist tasked with responding. With little understanding of proposal management, it was able to win a few big deals, but wasn't sure it could maintain its success moving forward.

Over the next several years, the organization's proposal management team grew into a separate department. As the proposal management team's responsibilities expanded, they developed a results-driven method to prioritize success at every turn and became relevant to the organization, becoming the go-to team for positioning advice and solutions.

The team recommends following these steps to find success:

- **Create a process.** Develop a process for the proposal life cycle and be consistent in its execution. Everyone needs to be using the same methods to be successful.
- **Solidify your bid/no-bid process.** Focus your efforts where you have the greatest chance of winning. This company took the Shipley bid/no-bid process and tweaked it to align with its own organization. This process helped the organization make

better decisions and, in turn, increased its win rate.

- **Lead the kick-off call.** Create a standard agenda for all kick-off calls, and ensure you ask the right questions. Why has the client released the RFP? What is the winning theme? What are the client's pain points? What is your relationship with the client? What message do you want to leave with the client? How is your organization different?
- **Construct a proposal package.** This may include the bid/no-bid, a current-state client document, a high-level outline of the executive summary, the theme and differentiators, a snapshot of the solution, the responsibilities matrix, and the gap analysis template.
- **Organize the content.** Invest in a proposal management software program with a solid knowledge management system. Create small content entries so you can grab individual pieces of content and customize each response.
- **Ensure you have buy-in.** Ensure everyone on the bid team is involved from the beginning, to guarantee commitment. If the team can't commit to the response, don't respond; you are setting yourself up to fail.

- **Do more than insert the “corporate info.”** With a robust knowledge management system, you become instrumental in the response. The proposal management team at this company completes about 80 percent of the response, leaving just 20 percent for the extended bid team. Responding to RFPs isn’t nearly as painful as it was years ago.
- **Back it up.** Organizations want to see your processes are supported by a larger source. Comb through proposal management guides of successful commercial bidders or listen to webinars from industry experts. This company in particular built on tools like those developed by Dr. Tom Sant, who introduced “weasel words,” the NOSE (needs,

outcomes, solutions, evidence) theory, writing the executive summary first, and customizing storyboarding templates, to name a few.

- **Prove it.** Demonstrate your team has a huge impact on the organization by tracking and presenting solid metrics. This IT company tracks proposal win and loss and revenue and margin win and loss—information that is very powerful and relevant to executives. These results allow you to analyze what you are doing well and where your opportunities are. The company in this case took it one step further: It reported on proposals by industry and analyzed the data to see which themes were successful and which were not.

The proposal management department created internal procedures, started responding to only those requests core to the organization’s business, and increased the overall win rate to more than 40 percent. Through developing standards, reporting on meaningful metrics, and creating processes, any proposal management team can become relevant and achieve success. ●

**Tracie Bretecher**, CF APMP, has more than 10 years of proposal management experience, and has been with Long View Systems since 2008, where she developed a systematic approach to RFP responses. Tracie recently achieved her Foundations level accreditation with APMP and will be going for the Practitioner and Professional accreditation over the next year. She can be reached at + [tracie.bretecher@lvs1.com](mailto:tracie.bretecher@lvs1.com).

**PROPOSALS**  
Getting **STARTED** Getting **BETTER**

**The stakes are high.  
Time is short.  
BE PREPARED.**

“An easy-to-use and enormously helpful guide to proposal responses.”  
*M. Creede, PEng, Certified Professional Career Coach*

“I recommend this to everyone involved with RFX processes.”  
*R. Cleveland, Director, Education & Accreditation, SCMA*

by **ISABEL GIBSON MBA**  
**www.proposalland.com**



Proposals are no picnic.  
We love them anyway.

If you’re an exceptionally talented proposal developer with an interest in healthcare, contact us today.

Or, visit with our **Director of Professional Services, Melissa Cothran**, after her presentation on May 29, Bid & Proposal Con 2015, Seattle, WA.

**optimetra**

800.758.9710  
optimetra.com  
info@optimetra.com

© 2015 Optimetra, Inc. All Rights Reserved

# Get More From Your Annual Bid Management Report

## KEEPING TRACK OF THE DETAILS

By Farah Al-Nasser, CF APMP



Your proposal development team isn't the only part of your organization that benefits from these reports. **Upper management can use the results to analyze sales metrics to determine where funds are best allocated** and to determine what new markets or sectors could benefit from the organization's outreach.

**THE ANNUAL BID** Management Report is a comprehensive report that gives shareholders and other interested parties information about an organization's activities and financial performance from the preceding year. It is an important tool that can be used to improve the organization's performance, achievements, and progress throughout the next year.

### ANNUAL BID MANAGEMENT REPORT OUTLINE

There are six components that make up the Annual Bid Management Report. Including these sections is crucial to the success of your report in providing the most accurate data for a productive year.

- **Bid Management Process.** Illustrate your process for managing bids and preparing proposals. Include your process around opportunity initiation and preparing and submitting proposals and required documents; mention all stakeholders' roles. This look at your process will give you a clearer picture of how the process affects your performance results. The simplest way is the best way: Show the process in a flowchart or other graphic representation. Microsoft Visio is useful for this portion of the report.
- **Pending Proposals.** Follow up and track leads that are still open in the bid cycle. Knowing the outcome of these bids will add crucial data to the report, no matter which way they turn out.
- **Shortlisted Proposals.** Analyzing shortlisted proposals allows you to focus on your technical strengths and weaknesses and identify any potential gaps in your process.
- **Won Proposals.** Your report cannot be meaningful without listing the year's winning proposals, total proposals' value, and growth in revenue and profit. This information will help you determine how far you are from your target so you can accurately set a target for the coming year.
- **Lost Proposals.** Analyzing the reasons behind losing bids helps you minimize loss in the future. Any improvements you can make to your process based on past mistakes or oversights are worth the effort of evaluating this portion of your annual report.
- **Key Performance Indicators (KPIs).** Analyzing your KPIs from the past year is an important step in improving the KPIs for the next year.

# The KPI Checklist

## YEARLY SUMMARY

Comparing your KPIs through the years will give a clear indicator of your performance and where improvement efforts should be focused in the coming year.

## PROPOSALS SUBMITTED PER MONTH

Identifying high and low seasons of tendering helps to improve the strategic plan.

## COMPETITOR PRICING ANALYSIS

Analyzing competitor pricing allows you to identify the price to win (PTW) and helps you determine your position among others. For accurate measurements, compare prices based on bids in similar scopes of work.

## TIME NEEDED FOR PROPOSAL PREPARATION

Tracking the time needed to prepare each proposal will help you identify your team's capabilities and will affect your bid/no-bid decision.

## COVERED SECTORS

Monitoring the covered sectors determines which sectors select your offerings more than others.

## PROPOSALS SUBMITTED PER COUNTRY

Listing your submitted proposals per country shows which markets you could expand into in the coming year.

Your KPI analysis will help you identify peak and bottom sessions, clear your vision in considering critical decisions, and give a detailed depiction of business development over time. You can use many KPIs to illustrate the aspects of your time management plan and highlight your achievements through the year. KPIs may differ from one organization to another depending on factors such as strategic goals, industry, and type of clients.

To help keep accurate records of each piece in the annual report, log these elements all year long. If you keep track of your process as it's happening, or as soon as it's complete, there is less chance of forgetting important elements. Try keeping a proposal log, so all the information is in one place. This makes compiling the report at the end of the year much more streamlined.

Once you've compiled the data, present your report in a digestible way. Any audience should be able to comprehend it, whether it's a proposal manager, team member, or upper management. Avoid long write-ups and nongraphical results. Graphs and short explanations offer readers a visual view of the results and the interpretation all at once.

With these practices in mind, your Annual Bid Management Report will surely offer you and your team a chance to fine-tune your proposal development process for future success. ●

**Farah Al-Nasser, CF APMP**, is an industrial engineer with more than 5 years of experience in bids and proposals management, business development, sales and marketing content development, and costing and pricing management. She works at METHOD Corp—Project Management Enablers. Farah can be reached at + [farah.alnasser@hotmail.com](mailto:farah.alnasser@hotmail.com).



# The Benefits of Infographics

## SEEING MEANS ABSORBING MORE, FASTER

By Toren Beasley and Monica Seaberry

### IN AN INFORMATION-FILLED

environment like ours, where people are absorbing more than 34 gigabytes of information daily, information graphics, or infographics, work because they take advantage of the human brain's most efficient systems. When the best of text and visual techniques are combined into an infographic, our brains are able to absorb and retain information much more efficiently than using either technique alone.

After all, nearly 50 percent of our brain is involved in visual processing, and 70 percent of our body's sensory receptors are in our eyes.

Understanding an infographic takes no time at all—just 150 milliseconds for a symbol to be processed and 100 milliseconds to attach meaning to it. Because infographics can pack a lot of information into a small space, they are attractive tools for proposals where page count is an issue.

### THERE'S SCIENCE BEHIND INFOGRAPHICS

Infographics are not the new kid on the block in terms of data or process visualization. They have been around since the 17th century, and today, there is some serious science behind them, culled from an understanding of human perception. That's why they have become indispensable tools.

Great infographics shift the balance between seeing and thinking. Seeing is extremely fast and efficient. We see immediately and with little effort. Thinking is slower and less efficient. Traditional text-, table-, and column-based



Graphic by Seaberry Design & Communications

With a map, readers will

# SEE

where your company offices are located.

With a list, they  
**WON'T.**

OFFICES:  
ATLANTA, GA  
BIRMINGHAM, AL  
CHARLOTTE, NC  
CHICAGO, IL  
COLUMBUS, OH  
PHILADELPHIA, PA  
NEW YORK, NY  
WASHINGTON, DC

## HOW MUCH BETTER

is your solution than that of your competition?



Graphic by Seaberry Design & Communications

presentation methods rely on conscious thinking for almost all of the work. Information graphics shift the balance toward use of our quick and effective visual perception.

### EVER-INCREASING POPULARITY

In the realm of complex data interpretation, infographics are king. On the Internet, where companies vie for the attention of billions of users, the use of infographics has soared nearly 10,000 percent in the last decade.

The popularity of infographics has increased so much that they now extend into the federal sphere. Government contractors are relying on them to better explain their companies and increase win rates, and government agencies are using infographics to improve public information campaigns.

Because proposal evaluators undoubtedly suffer from the drag of information overload, putting good infographics in otherwise text-heavy areas of a proposal can lighten



**500%**  
**DECREASE**  
IN TIME SPENT CREATING PROPOSALS

BARBARA MCCORMACK  
VP SALES, SECURITAS USA

**150%**  
**INCREASE**  
IN PROPOSAL OPPORTUNITIES

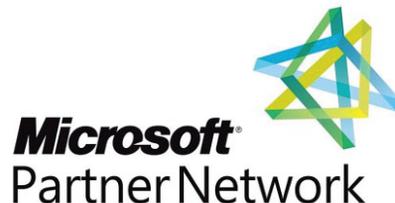
BARBARA MCCORMACK  
VP SALES, SECURITAS USA

Hitting these numbers requires an understanding of best practices in sales enablement and proposal generation software. Learn how to increase sales using our exponentially disruptive technology. Stop by APMP to see a demo of our new RFP Tool!

- Create all your proposals, templates, price quotes and ebrochures in one centralized location.
- Track how prospects interact with your proposals.
- Make your proposals more effective by adding videos and recorded messages.
- Ensure that you're always working with the latest and most accurate proposal assets.
- Get legally binding sign-off through eSignature or print professional hard copies.
- Integrates with Salesforce, NetSuite CRM or Microsoft CRM.
- Viewable on desktops, laptops, ipads, iphones and androids mobile devices.

**“The best thing out there for RFPs”**

Client Partners - CRM Partners



[www.paperlessproposal.com](http://www.paperlessproposal.com)

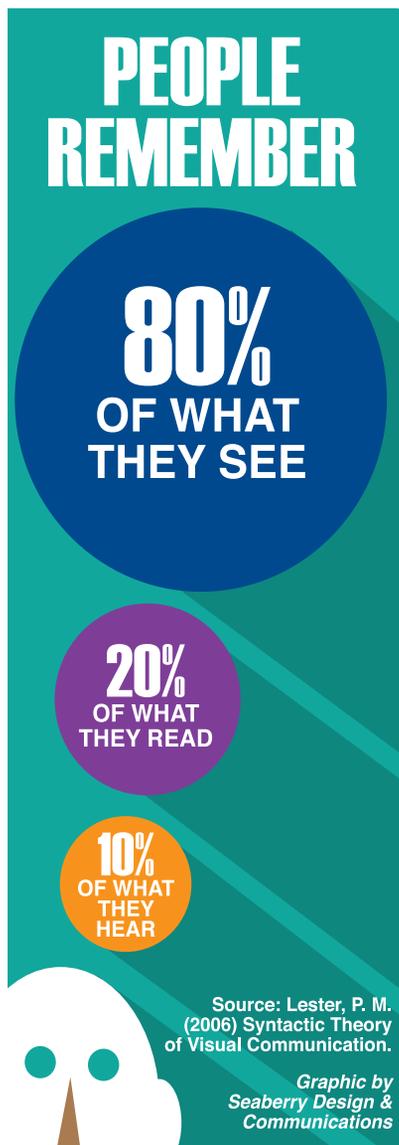
# SHOW &

your process



# TELL

your story



the cognitive load and may give a company the boost it needs against the competition.

#### NOT JUST FOR RESPONSES TO RFPS

The utility of infographics doesn't end with efforts to win contracts. Infographics serve an important internal function for companies as well.

Without a doubt, a typical company—or even a department for that matter—is a complex operation. Employees may not be eager to tackle wordy company policy, procedure, and workflow documents. Information that is presented in a visual manner is easier to absorb and gets everyone on the same page much faster.

Enhancements to internal documents, like changing tables to charts and illustrating workflows, are significant improvements, but why stop there?

Infographics can simplify communication, clarify messaging, and illustrate step-by-step processes. Infographics can compress time and space, illuminate patterns in massive amounts of data, and make the abstract

convincingly concrete. Company sales leaders can gain a competitive edge by adding infographics to sales pitches. Even management can make decisions more easily by using infographics to illustrate key data.

The benefits of using infographic content in proposals, on websites, and internally are obvious. The increase in their use is in direct response to the increased volumes of information people in every arena are now required to absorb and the increased speed at which information travels. Today, the smart money is on better, faster, more efficient tools for communication. ●

**Toren Beasley** is chief operating officer and client liaison, and **Monica Seaberry** is president and creative data organizer at Seaberry Design & Communications LLC, a graphic design company that specializes in information graphics and document layout while providing communications solutions and editorial production support to its clients. Toren and Monica can be reached at + [toren@seaberrydesign.com](mailto:toren@seaberrydesign.com) and + [monica@seaberrydesign.com](mailto:monica@seaberrydesign.com), respectively.



# IF ONLY RFP COMPLIANCE RULES WERE THIS EASY TO FOLLOW.

Faced with the ever increasing demands of working in a regulated industry, are you confident your RFP/RFI/DDQ Responses, Sales Proposals or Presentations will pass a compliance audit today? Ensure 100% legal and brand compliance of every document, every time, with the new Compliance Central module found in PMAPS WebPro – The proposal platform of choice by proposal professionals just like you.

Request a demonstration today, and ensure compliance with your business prospects tomorrow.

**proposalsoftware**  
proposalsoftware.com/compliance

# Quantifying Qualification

## USING THE NUMBERS GAME TO DETERMINE WHEN TO BID

By Chris Hann, CF APMP

THE QUALIFICATION STAGE is all-too-often considered a formality that sees 90 percent or more received RFPs go through to a decision to bid. It's sometimes referred to as "the gate," since sales teams simply barge right through it like a monster truck through a rickety fence.

Sales reps won't listen to reason. After all, who cares if they only just heard this company exists? They won't listen to experience. Who cares if you have been in the proposal business for years? They don't even seem to care that you are a certified ninja in proposal management ... the nerve!

If this all seems annoyingly familiar, it is time you introduce something so compelling it cannot be ignored: the revolutionary Quantifying Qualification approach.

### THE SCIENTIFIC APPROACH

Quantifying Qualification is simply the term used for assigning and tracking quantitative values to responses that the sales team provides to your standard qualification questions. To master the approach, follow this simple four-step process.

1. **Identify 10 Core Qualification Questions**  
Ask yourself which 10 questions you must ask to get at the heart of whether or not any RFP is qualified.
2. **List All Possible Responses to the Questions**  
Think carefully about the responses you typically hear to each question and come up with

### Did we know about the RFP prior to release?



- No = **0 POINTS**
- Yes, but less than 2 weeks = **2 POINTS**
- Yes, more than 2 weeks prior = **5 POINTS**
- Yes, we influenced the writing of the RFP = **8 POINTS**
- Yes, the RFP is wired for us = **10 POINTS**

all the possible responses in order of worst case to best case.

### 3. Assign Numerical Values to Each Response

Using a scale of zero to 10, where zero is worst case and 10 is best case, assign values to each of the possible responses.

### 4. Create a Scoring Tool

Once you've completed the first three steps, you are now ready to pull it all together to build a scoring tool. Upon answering all 10 questions for a specific RFP, you can use the tool to tally the scores for each question and generate a total percentage score for the opportunity.

### REVOLUTIONARY?

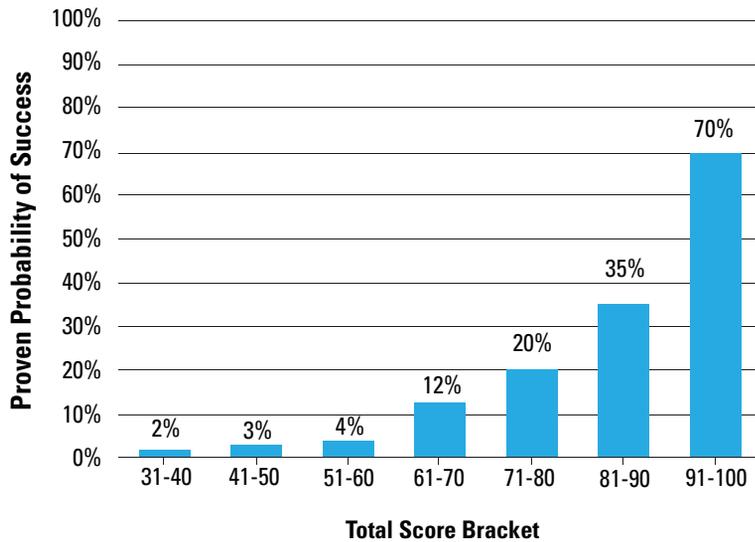
The revolutionary part of Quantifying Qualification comes in when you record the scores in your customer relationship management (CRM) system. Your IT team can help you add fields for each scoring tool question on the opportunity page (or associated object) to enable you to enter all scores and track them over time.

### BENEFITS

When you track your qualification scores in the CRM system against the actual opportunity outcomes, you will revolutionize the way your company decides whether or not to bid.

You will start seeing which scores result in positive opportunity outcomes. Then you can provide a company-specific probability of winning to the sales team at the end of the bid/no-bid call. For example, you could say, "A score between 41 and 50 has proven to result in a 3 percent chance of winning in the past for us. Is that worth the resources we would have to invest here?"

If that is not powerful enough, imagine the possibilities of correlating individual question scores against actual opportunity outcomes. Using the statistics, you can build a business case to help management set crystal-clear policies around qualification. Imagine the reduction in wasteful proposals at your company if there was a management-enforced policy stating "If we did not know about the RFP



prior to release, sales teams will not be permitted to bid without strict escalation.” For most companies, a policy like this would cut proposal volumes in half!

The Quantifying Qualification approach frees up resources to pursue winnable and more strategic opportunities. In the words of APMP ninja literature: Win rates will be maximized! ●

**Chris Hann, CF APMP**, is a proposal and operations manager at OpenText, with a background in actuarial analysis, political science, and process improvement. He can be reached at + [chann@opentext.com](mailto:chann@opentext.com).

**APMP FELLOWS**  
Leaders. Contributors. Mentors.



DEDICATED  
**TO RAISING**  
THE BAR



[www.apmp.org/fellows](http://www.apmp.org/fellows)

# Asking the Right Questions

## GETTING THE MOST FROM THE BID CLARIFICATION PROCESS

By Phil Hall



### ASK THESE QUESTIONS DURING YOUR NEXT BID CLARIFICATION PROCESS.

**Is it really important?** Is your clarification question crucial to the development of a winning bid or are you just asking “nice to know” questions?

**What does a good answer look like?** If the answer to your question will be unclear or not provide adequate information, then perhaps the question is not worth asking.

**How many questions are you asking?** If you are making assumptions, then you need to be asking more questions; that is the whole point of the process.

IN ALL PUBLIC sector procurements, and in many within the private sector, there are opportunities to formally submit clarification requests, whereby the client or commissioner is asked to clarify a specific or general point relating to the process. Unfortunately, many bidders make poor use of this critical step: first, in deciding whether to bid; and second, in developing a winning proposal.

The types of questions asked typically fall into these categories:

- Microscopic details relating to technically interesting but strategically unimportant areas
- Requests for more information in areas where it has already been communicated that there is nothing more to give—for example, in the public sector, more details of personnel that might transfer to the bidder’s organization as a result of winning the contract
- Ambiguous questions asking the client or commissioners to “clarify their approach to \_\_\_\_\_.”

Bidders often seem reluctant to ask meaningful questions—perhaps because they are afraid the answers will be shared with all bidders or may offend the client. As a result, they miss the point that without key information, their own bid will be as flawed as the rest. It is up to the other bidders to extract maximum value from any clarification responses, so don’t worry about what the competition is doing; just

focus on your own bid. Clarifications are the golden opportunity to test and validate your assumptions. Many times, when debriefing unsuccessful bidders, the response to feedback begins with the statement “But we assumed you meant...”

A bidder’s use of the clarification process is generally not evaluated or scored and plays no part in choosing a preferred bidder, so use it well, especially considering it costs nothing to do so. Don’t make the mistake, however, of submitting your IM&T department’s wish list of information—every question they would like to ask if they had the opportunity—and expect a response to each item. Think commercially and strategically about the questions you need to ask.

Consider asking the following questions to get the answers you need:

- How will the moderation process be managed to arrive at consensus scores among the evaluation panel? Will there be a casting vote? How will you moderate individual panel members’ scores if they differ by more than one mark?
- Having reviewed the bid documentation in full, we believe your top three priorities when selecting a supplier for this service are (1) staff continuity, (2) workforce development plans, and (3) skills transfer approach. Please confirm these are correct.
- When comparing final bid scores, how will you ensure that



a difference of one mark (the difference between winning and losing) is statistically significant and robust enough to withstand future scrutiny?

- If you have two bidders with the same overall final score, what process and metrics will you use to select a winner?
- When reading question 42, we can interpret it in two ways. Please confirm which of the following two possibilities is the correct interpretation: \_\_\_\_\_

The point of asking for clarification is to help you reach conscientious bid/no-bid decisions and to support you in developing a winning proposal. If a clarification question does not support either of those objectives, then ask yourself whether it's a question worth asking. Nice-to-know information can usually be dealt with much more easily during due diligence or contract mobilization once you have won the bid.

Don't forget that if you submit a clarification question, the worst that can happen is the client will

say "No, we can't answer that." In that case, you are no worse off than you were before you asked. A good clarification question, well phrased and constructed, could provide you with some golden nuggets that gain you the few (statistically significant!) marks needed to win. Remember that commissioners and customers want to receive good quality bids, so use the clarification process they have given you to raise the quality of your submission. ●

**Phil Hall** is a senior procurement leader with more than 30 years of commercial experience in both private and public sectors. He is a member of APMP as well as the Chartered Institute of Procurement and Supply (MCIPS). When not running complex procurement projects, he supports small and medium organizations to become better bidders and grow their businesses.

**APMP**  
Approved Training Organizations  
*Onsite and Online Certification Opportunities*

**APMP ATO**  
APPROVED TRAINING ORGANIZATION

Bid Management Services  
Bid to Win  
Bids, Proposals, Tenders  
CSK Management  
LOHFELD CONSULTING GROUP INC.  
Shipley Associates  
Shipley  
StrategicProposals

[www.apmp.org/ATOs](http://www.apmp.org/ATOs)

# Commercial



## The High Jump: Leaping over the Hurdles of Supplier Change in Commercial Proposals

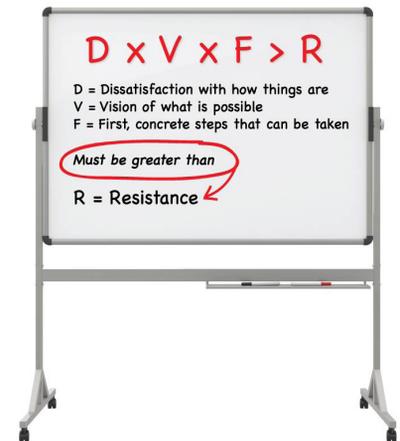
By Steven K. Rosemurgy

Imagine you are bidding on a new piece of business that has a strong incumbent competitive supplier, and you know the proposal you submitted is spot on. The value props are strong, the solution is innovative and identifies the pain points of the company, and you are competitively priced. After a weeks-long RFP process with positive sales signals, it ends with you being told, “No, thanks.” Despite all the challenges you successfully navigated, you were unable to overcome the highest and most important hurdle of them all: supplier change.

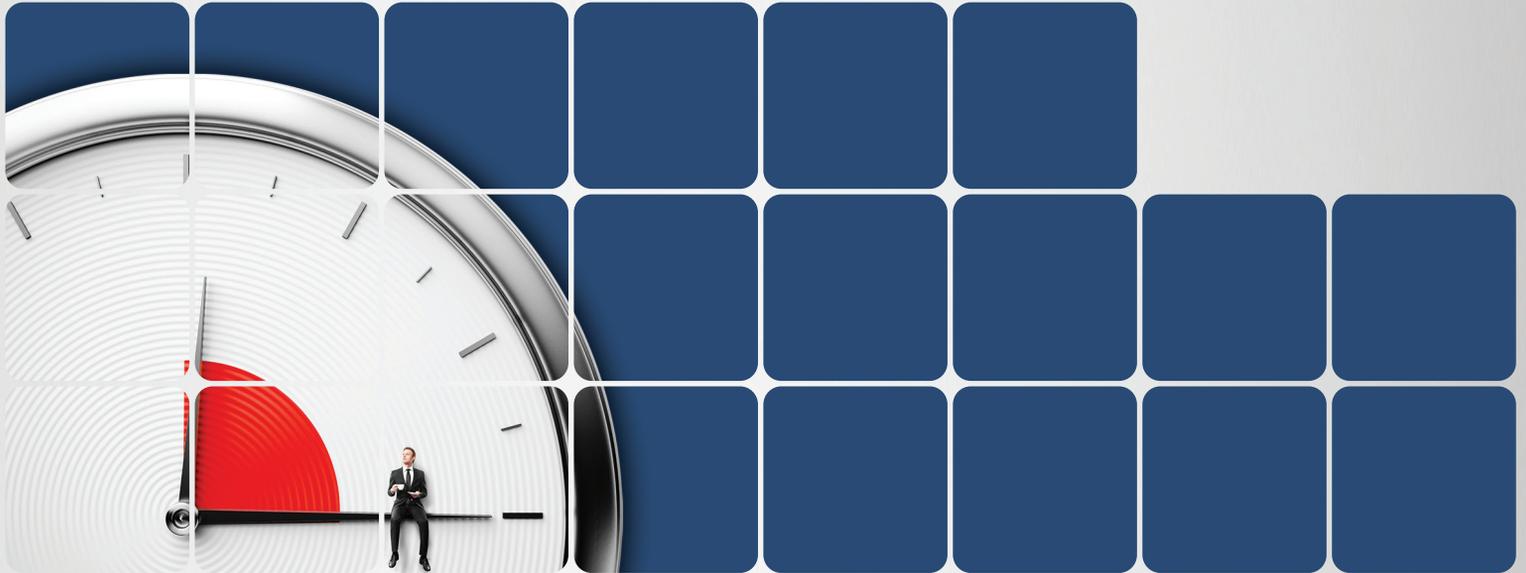
Even when the incumbent supplier has a history of poor performance, the resistance to supplier change can be greater than your ability to overcome it—unless you understand what is needed to win. Gleicher’s Formula for Change offers insight into this challenge. Although it may be hard to accurately quantify levels of dissatisfaction (D), vision (V), first concrete steps (F), and, finally, resistance (R) in any new business supplier opportunity, there is one important rule to keep

in mind: If any of the variables on the front end of the equation (D, V, or F) are zero, then resistance (R) cannot be overcome, and *change will not occur*.

People—and businesses—are naturally averse to change. Understanding the factors inherent in resisting change is a major step in the process of overcoming them. Dr. A.J. Schuler, an expert in change and author of *Top Ten Reasons for Change Resistance*, offers some invaluable insight. Although directed



toward individuals, some of these reasons can be applied to new business proposal development. Even if you are the current supplier trying to retain the business, understanding these hurdles will give your team insight throughout the entire RFP process.



## The creation of highly customized, complex, and personalized documents & proposals made easy.....

- Streamline your standard approach to managing proposals, pitches and presentations
- Generate proposals faster; reducing time, effort and costs
- Improve consistency and branding so your proposal documents look more professional
- Cut turn-around times on RFP responses
- Improve collaboration between sales, marketing and technical teams
- Build and leverage your approved content library

Better documents.... *faster!*

To learn more visit  
[www.qorusdocs.com](http://www.qorusdocs.com)

[info@qorusdocs.com](mailto:info@qorusdocs.com)  
+1 844 516 8000

Microsoft Partner  
Gold Application Development



When going after a new business opportunity, put yourself in your prospect's shoes and create "Top 3" lists based on the following questions. Keep your lists with you while developing your proposal strategy and response.

**1. What are the top three things the current supplier isn't providing?**

A good sales person should be able to tell you the concerns a prospect is having with its current supplier. But don't stop there; dig deeper. Find out what customers say, do your own "mystery shopping," and get a clear understanding of the level and nature of dissatisfaction.

**2. What are the three things we can do for the prospect that the current supplier can't?**

Refer back to No. 1 and think creatively and clearly. This becomes the core of your value proposition and should reflect the "art of the possible."

**3. What are three things we can deliver to the prospect upon launch of the relationship?**

A prospect will appreciate tangible examples of the small battles that can be won early in a relationship.

**SIX HURDLES TO OVERCOME IN SUPPLIER CHANGE**

**1. The risk of change is considered greater than the risk of standing still.**

Making a supplier change requires a leap of faith: choosing the unknown on the promise that something will be better. Taking leaps of faith is risky, and businesses will move forward only if they genuinely believe the risks of maintaining a current supplier are greater than the risks of going in a new direction.

**2. People feel connected to others who are identified with the old way.**

Businesses are social in nature. They become, and like to remain, connected to the suppliers they know—even if, at times, that is to their own detriment.

**3. Businesses often need role models to demonstrate.**

Never underestimate the power of experiential learning. Many businesses like to say they are leading the industry, but the majority of them are much more comfortable in the fast-follower role. Seeing others that have gone first in making a similar supplier change strengthens your position.

**4. Decision makers feel overloaded and overwhelmed.**

The people making the decision to keep a supplier or go with a new one are probably also those who will negotiate the path of transition. This may mean more work for them in an environment where they are already overburdened. Never underestimate the human capacity to choose the path of least resistance!

**5. People have a healthy skepticism and want to be sure your ideas are sound.**

Remember that few worthwhile

solutions in an RFP response are in their final form at the outset. Healthy skeptics during supplier selection perform an important function: Vet the proposed solutions so they can be improved upon and ultimately become reality. Listen to your skeptics. Some of what they have to say will prompt genuine improvements to your proposal and help you on the road to being selected.

**6. Supplier change is generally seen as a bad move.**

Those who are resistant (and sometimes even hostile) to supplier change are not necessarily being recalcitrant, afraid, or nasty when they resist. Sometimes it's just the wrong timing. It's important not to ignore those who have genuine reservations. Your attention to them is critical to either winning the business or retaining it. If these people have a role in managing your future supplier relationship, you want them to be committed to your success, rather than determined to see you fail.

To win a business's commitment for supplier change, you must engage the individuals involved on both a rational and an emotional level. Put yourself in the prospect's shoes. Understanding and overcoming the factors inherent to supplier change resistance will greatly enhance your chances of successfully closing the deal. ●

---

**Steven K. Rosemurgy** is the business development strategy and support leader for Allstate Roadside Services, a business unit of Allstate Insurance Company, where RFP response strategy and proposal development is a key part of his role. He has nearly 30 years of experience in B2B brand marketing and business acquisition, growth, and retention. He can be reached at + [steve.rosemurgy@allstate.com](mailto:steve.rosemurgy@allstate.com).



Imagine winning larger business deals faster while increasing your proposal team capacity.  
Sound too good to be true? Maybe it's not.

## High quality proposals win more business.

Visit [www.savogroup.com](http://www.savogroup.com) to learn how SAVO and our partnership with Strategic Proposals, LLC can help you create high quality, high impact proposals today.



**SAVO**

**SMARTER  
SELLING™**

# Federal



## The Workflow: Prioritizing and Assigning Federal Proposal Resources

By Candace Jenkins

Whether you're a large company with a dedicated proposal shop or a small company where everyone wears multiple hats, prioritizing and assigning resources for a proposal effort can be a significant challenge. In the federal sector, additional security requirements can further complicate the issue, for example, when an RFP designates that only U.S. citizens are authorized to view or respond to the performance work statement (PWS) or statement of work (SOW). This additional requirement can limit the options of an organization that employs foreign nationals or offshores some proposal tasks. Having a streamlined, centralized process for prioritizing and assigning valuable and limited resources for these federal pursuits can reduce time, money, and frustration in staffing a proposal team.

Larger organizations with resources solely tasked with shaping and preparing proposals can realize significant benefits by establishing a formal process to request and assign resources. A forum where leaders responsible for assigning resources meet to discuss RFPs can save time (and money) and alleviate the potential for frustration in assembling a proposal team. Those responsible for assembling the team have a one-stop shop to request

all resources, which eliminates the need to coordinate with multiple people at different times to discuss the same deal. An example of the flow of this process can be seen in Figure 1 on page 32.

In addition to reducing the effort needed to assemble a proposal team, long-term benefits result from implementing a well-thought-out, streamlined process, especially for those organizations in the federal sector, where government funding

can fluctuate with political and economic climates.

When establishing a process for an organization pursuing federal business, several topics specific to federal concerns may arise: What are the security requirements? Does the work need to be conducted in a sensitive compartmented information facility (SCIF)? Are there sufficient resources with the proper clearances to be able to respond to multiple requests, if necessary? Having security-constrained responses might seriously limit the resource pool of smaller companies.

While in the early stages of creating a new process, several items are critical for success:

- **Confirm senior leadership support.** If the idea is supported from the top and people who have responsibilities within the process are held accountable, the likelihood of success is increased significantly.

# REDEFINING DOCUMENT COLLABORATION

XaitPorter®  
Focus – Collaborate – Create

XaitPorter is a cloud-based solution that allows you to win more business.



**Focus** on your clients' needs – **Collaborate** with your team anywhere.  
**Create** high-quality proposals and documents more efficiently.

**Xait**®

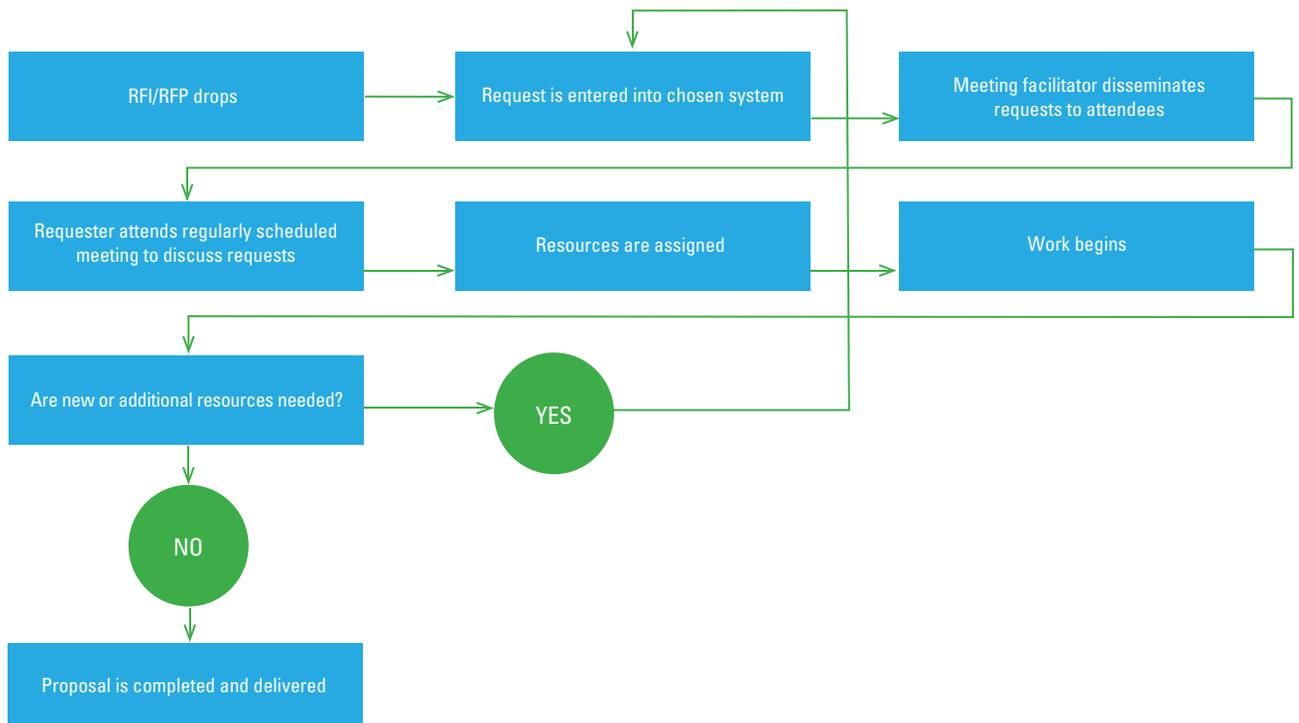
USA: +1 512 266-1676 UK: +44 (0) 20 3011 0014 Norway: +47 51 95 02 00

[www.xait.com/apmp](http://www.xait.com/apmp)

Meet us at APMP's Bid & Proposal Con 2015 in Seattle, WA. May 26-29 2015



Figure 1: Federal Proposal Resource and Workload Allocations



- **Sell the benefits to the users.** Implementing a new process requires change, and most humans are wired to resist change. Opening communication will go a long way in minimizing the resistance to dealing with something new.
- **Consistently adhere to the process.** As behavior specialists tell us, consistency with expectations and consequences is effective in controlling a child’s developing behavior. Of course, professionals in the workplace are not children, but the concept is still valid. People tend to regress into old routines without realizing it. Consistent encouragement to follow a new workflow will, ultimately, lead to a new pattern of behavior.
- **Provide sufficient training.** Any new process will have some false starts and wrinkles, but a strong launch that includes training sessions, an easy way to

**Perform Gap Analyses:**

Trends will show which resources are overbooked and which areas are sufficiently staffed. Tracking requests and utilization can help determine whether the right balance of resources is available and can inform hiring decisions.

**Discuss Priorities:** When resources are spread too thin, having a regular forum with all the right players provides an opportunity for decision makers to prioritize the workload based on personnel availability.

provide feedback and ask questions, and a detailed description of what is expected of stakeholders will make the transition quicker and easier.

- **Ensure the resource managers’ support.** As

important as having buy-in of senior leadership is, the support provided by resource managers cannot be underestimated. Implement a process to create value easily recognized by all players, with the people assigning resources at the top of the beneficiary list. If they feel their lives have been made a little easier, they will be supportive of the process.

No one wants a process just for the sake of having one, but in the current federal world where RFP response times are decreasing and budgets are getting tighter, having an organized and centralized way of managing the resource pool can eliminate some of the stress and chaos that abounds in the proposal realm. ●

**Candace Jenkins, CF APMP**, has more than 20 years of experience in supporting federal, state, and local proposals. She currently leads the Global Proposal Center for Unisys in Northern Virginia. She can be reached at + [candy.jenkins10@gmail.com](mailto:candy.jenkins10@gmail.com).

B<sub>3</sub> I<sub>1</sub> D<sub>2</sub> M<sub>3</sub> A<sub>1</sub> N<sub>1</sub> A<sub>1</sub> G<sub>2</sub> E<sub>1</sub> M<sub>3</sub> E<sub>1</sub> N<sub>1</sub> T<sub>1</sub>

S<sub>1</sub> E<sub>1</sub> R<sub>1</sub> V<sub>4</sub> I<sub>1</sub> C<sub>3</sub> E<sub>1</sub> S<sub>1</sub>

*a winning way with words!*

Specialists in European tendering

[www.bidmanagement.ie](http://www.bidmanagement.ie)

*Global Proposal*

# SMARTS



# SUREFIRE WAYS TO EXPAND YOUR CULTURAL INTELLIGENCE

BY STEPHEN R. GALATI, CGW, CP APMP

**A**s firms become more globally focused in their outlook and operations, the necessity to work in and understand diverse cultures intensifies.<sup>1</sup> Proposal professionals tasked with winning global work are witnessing that domestic and global markets are substantially different and using domestic strategies globally is an insufficient approach for market and client penetration.<sup>2, 3</sup> To be successful overseas and in multicultural markets, proposal professionals must not only be culturally aware but also be willing to enhance their global proposal “smarts.”

A leading area of research and focus for understanding and growing cultural competency is *cultural intelligence*. An individual’s cultural intelligence, or cultural quotient (CQ), goes way beyond knowing when to shake hands or bow. The latest CQ models focus on communicated motivations, demonstrated behaviors, and higher-level thinking related to culturally diverse or different environments. New research showcases ways managers can self-assess their cultural understanding and develop ways to improve how they communicate and conduct business globally. For proposal professionals, understanding how to communicate multiculturally will strongly benefit efforts to win global or nondomestic proposals.

This article focuses on four surefire ways to improve your CQ as a proposal professional, regardless of your in-practice experience on the global front: (1) learn to conduct a baseline assessment of your cultural competency, (2) stay close to your client’s cultural needs, (3) leverage

any cultural understandings in proposals and within your company, and (4) engage in the global village.

## WHAT IS CULTURAL INTELLIGENCE REALLY?

Simply put, cultural intelligence, or CQ, is a person’s aptitude to work, interact, and manage in a cross-cultural and diverse environment.<sup>4</sup> Proposal professionals with a higher CQ are able to better understand global clients and their needs, recognize any cultural aspects to a bid, understand how to interact with the client, and better position their proposal to win. The model of CQ most pervasive in business divides a person’s cultural competency into four individual cultural factors: cognitive, metacognitive, behavioral, and motivational dimensions.<sup>5-7</sup> This model was further refined by David Livermore, president and partner of the Cultural Intelligence Center, who reclassified those four factors into more lucid terminology: knowledge, strategy, action, and drive.<sup>8</sup>

Cognitive cultural intelligence (CQ knowledge) is an individual’s knowledge of the traditions, practices, values, and societal norms related to a geographic area. This factor is knowledge-based and involves understanding cultural differences, needs, and expectations. CQ knowledge serves as a proposal professional’s core approach to a global client.

Metacognitive cultural intelligence (CQ strategy) is an individual’s awareness of other cultures, particularly during interactions with people of different cultural backgrounds. This factor characterizes an individual’s higher-level thinking process in cross-cultural engagements. Livermore called this factor CQ strategy because

## As a proposal professional, quantifying and understanding your CQ arms you with the knowledge and tools to pursue global opportunities more effectively.

he contends that business leaders who have high metacognitive cultural intelligence are strategists who have the ability for robust cultural awareness, sound planning, and effective monitoring of cultural interactions.<sup>6</sup>

Behavioral cultural intelligence (CQ action) is an individual's ability to act appropriately in cross-cultural situations, particularly through verbal and nonverbal actions and through methodologies employed in the conduct of business.<sup>6</sup> Proposal professionals with high CQ action scores will know how to interact appropriately with people from differing cultural backgrounds, including knowing what to say to clients, how to say it, and how to communicate in proposals with cultural sensitivity.

Motivational cultural intelligence (CQ drive) is an individual's ability to pursue learning about cultural differences and provide focus on cross-cultural situations.<sup>4,9</sup> Livermore called this factor CQ drive because it encompasses the individual's motivation and determination to adapt cross-culturally and apply energy to overcoming cultural challenges.<sup>6</sup> This factor is perhaps the most telling for proposal professionals geared to improving their cultural skill sets, because without motivation, change and growth are futile.

### START WITH A PERSONAL CQ SELF-ASSESSMENT

Proposal professionals looking to expand their cross-cultural skills and win more work in the global marketplace should first develop a baseline understanding of their cultural aptitude. An effective way to determine your personal cultural aptitude and identify areas of existing cultural strength and weakness is to conduct a CQ self-analysis. A useful tool for self-analysis is the Cultural Intelligence Scale (CQS), a 20-item scale used for the assessment of CQ levels, both on a cumulative and an individual factor level. The CQS has strong psychometric properties, comprising six items for cognitive measurement, four for metacognitive measurement, five for motivational measurement, and five for behavioral measurement.<sup>4,10</sup> The tool offers a quantitative measure of CQ, highlights areas of proficiency, and exposes areas of deficiency.

As a proposal professional, quantifying and understanding your CQ arms you with the knowledge and tools to

pursue global opportunities more effectively. Performing this baseline assessment helps you identify areas for further individual education and refinement. The CQS can also help match proposal team members with appropriate roles. For example, individuals scoring high with the metacognitive factor would be better global proposal strategists, whereas those scoring high with the behavioral factor would be better at developing work plans or project approaches. CQ assessments can be performed prior to a proposal kick-off meeting, offering the proposal manager information about the team, guiding assignments, and the project approach. The Cultural Intelligence Center offers a CQ self-assessment tool and a CQ multirater assessment tool, which allows further input from peers.

### INCORPORATE YOUR CLIENT'S CULTURE INTO THE PROPOSAL

Maintaining a cultural "eye" and awareness of your own capacity allows for openness to the client's perspective. All too often, proposals are written with the project or consultant in mind rather than from the client's viewpoint. Global proposals require extra client-focused awareness, particularly for the client's cultural requirements and business customs. Remaining open to and communicating the cultural aspects of the procurement can add competitiveness to your submission and form the basis of continued personal growth with regard to culturally diverse clients.

Proposal professionals must incorporate understanding of the market environment and client practices into the proposal. Proposal managers should remain sensitive to local norms, such as specific meanings for imagery, symbols, colors, and nonverbal gestures during presentations. Some cultures even allow for paying off local authorities to facilitate paperwork and approvals. It is important to remember that the customs and ideologies of one culture do not always translate to other cultures. For example, in China, the color red suggests good luck and celebration, but in South Africa, red represents mourning. Face-to-face meetings are no different. In Japan, a bottle of American liquor is viewed as a respectful gift; however, that same bottle would be considered a major offense in Dubai. Knowing these differences will enrich your cultural competence.

The key to cultural success is for proposal professionals to do their homework and research their target client's customs, terminologies, power phrases, insults, and other societal practices. Enhancing CQ involves learning to recognize the cultural subtleties of the target market and understanding the abilities needed to pursue work in that target market. The proposal must convey this heightened cultural understanding. Color and imagery usage is easy—there are many resources dedicated to this form of communication. The true



# Best Practice at your Fingertips

## CSK Webinars and eLearning Modules:

- Writing convincing Executive Summaries
- Getting Bid- /No-Bid-Decisions right
- APMP Foundation-Level Prep Course
- Writing compelling Proposal Text

and more...

→ [www.cskmanagement.com/elearning](http://www.cskmanagement.com/elearning)

e-mail: [training@cskmanagement.com](mailto:training@cskmanagement.com)





testament to cultural understanding comes in the work plan or project approach. Sensitivities in the proposed approach to the local business practices and economies take research, strategy, and careful communication. Some great ways to enrich the cultural sensitivity of your proposals are to use small, local subcontractors on the project team, use materials made in that country or area, or incorporate area business practices into the work approach, such as allowances for prayer time, sun-down restrictions, and gender roles.

### LEVERAGING CULTURAL KNOWLEDGE

Although CQ is generally an individual skill set, positive implications exist with the continued application of cultural knowledge in proposals and within the company. CQ has become a significant factor in effective performance on both the individual and organizational levels.<sup>11</sup> Research indicates that culturally intelligent individuals prompt positive organizational performance when conducting business or other activities across country borders.<sup>12</sup> Likewise, organizations that make CQ a priority in their business strategy experience benefits such as enhanced performance, better decision making, flexibility, and international expansion.<sup>6</sup> Consequently, CQ influences an organization's performance on many levels and will undoubtedly emerge throughout the proposal and in the work approach.

CQ has become an important business consideration within organizations. Richard Bucher suggested that CQ serves as an organizational bottom-line issue, influencing organizational success, productivity, client relationships, and operational existence in the marketplace. In fact, CQ stems from individual leaders and spreads throughout the organization.<sup>13</sup> Culturally intelligent leaders who have satisfactory leadership and interpersonal skills enhance the organization's ability to succeed in the global marketplace.<sup>14</sup> Organizations that incorporate cultural intelligence as part of their business processes are more likely to fulfill their organizational mission and achieve desired organizational performance goals.<sup>6</sup> Ultimately, CQ can be infectious within an organization. Leveraging CQ knowledge will not only enhance your CQ action but can also augment further action by other open-minded professionals within your company.

### COMMUNICATE AS A RESIDENT OF THE GLOBAL VILLAGE

One of the most treasured attractions in Disney theme parks is the "It's a Small World" ride. Riders take a boat through different countries and are exposed to the customs, songs, and traditions in each part of the world. The overarching theme of the ride is that although people look and do things differently, people from all over the world are connected, have similar outlooks, and



## Recognised best practice to hand when and where you need it

### Our Executive Summary Builder:

- ✓ Helps you create powerful documents in 30 minutes
- ✓ Encourages you to engage, share with and learn from the customer
- ✓ Supports you in working more effectively with your sales team
- ✓ Puts best practice and training into action
- ✓ Aids you every step of the way with prompts and guidance



Learn about APMP member discounts  
For more information visit [www.shipleywins.co.uk/technology/APMP](http://www.shipleywins.co.uk/technology/APMP)

**Concurrence** 

*The technology arm of Shipley Limited*

share residency on Earth. This is a striking ideology for proposal professionals and has implications for enhancing CQ. Globally focused proposal professionals need to become residents of the “global village,” a term popularized by author Marshall McLuhan to illustrate our collective association on the planet. Principally, culturally intelligent proposal professionals acknowledge the similarities and respect the differences in the world.

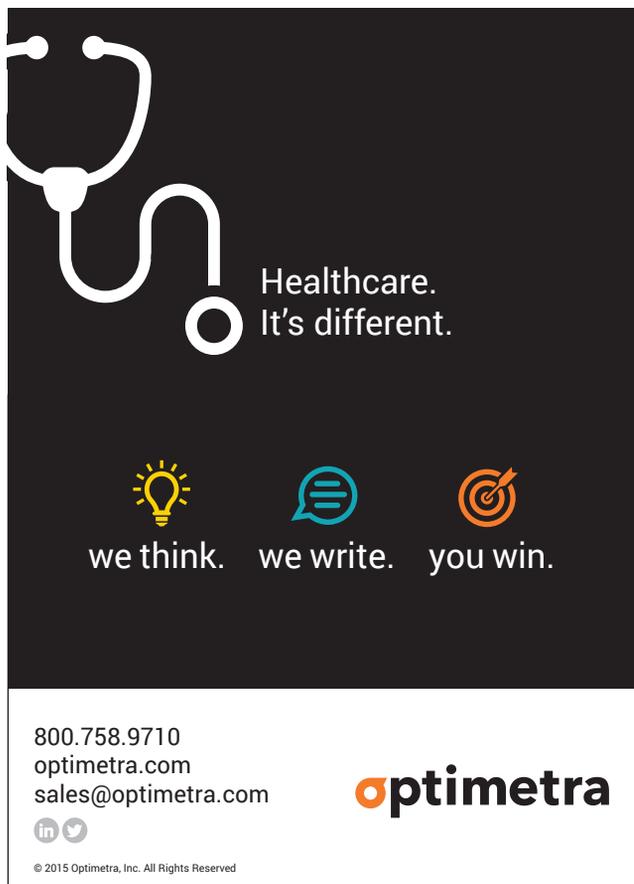
Part of residency in the global village is learning to communicate this collective association in the world and minimize references to differentiation. Global proposal writers should not focus only on geographic or cultural differences but rather communicate a sisterhood concept and ideology to the client. Enhancing CQ involves embracing the global village premise through an openness to cultural variation. There can be distinct kinship through the proposed work only if the proposal writer is open to such a relationship. Ultimately, proposal professionals should embrace global diversity, show cultural affinity toward others, and, if absolutely necessary, hum “It’s a Small World.” ●

**Stephen R. Galati, CGW, CP APMP**, is manager of national proposals for TRC Companies, Inc. with more than 20 years of proposal management, technical and grant writing, and

electrical engineering experience. He has many publications concerning proposal writing, grant management, environmental consulting, and public and private funding. He can be reached at + [sgalati@trcsolutions.com](mailto:sgalati@trcsolutions.com).

#### Endnotes

1. Wren, Daniel. *The History of Management Thought*, Fifth Edition. Hoboken, NJ: John Wiley & Sons, Inc., 2005. Print.
2. Alimien, Monika and Kuvykait, Rita. “Standardization/Adaptation of Marketing Solutions in Companies Operating in Foreign Markets: An Integrated Approach.” *Engineering Economics* (2008, Vol. 56, No. 1). Web.
3. Valenti, Michael. “Engineering Across the Seas.” *Mechanical Engineering* (June 1995, Vol. 117, No. 6). Web.
4. Ang, Soon; Van Dyne, Linn; Koh, Christine; Ng, K. Yee; Templer, Klaus; Tay, Cheryl; and Chandrasekar, N. Anand. “Cultural Intelligence: Its Measurement and Effects on Cultural Judgment and Decision Making, Cultural Adaptation and Task Performance.” *Management and Organization Review* (2007, Vol. 3, No. 3). Web.
5. Earley, P. Christopher and Ang, Soon. *Cultural Intelligence: Individual Interactions Across Cultures*. Stanford, CA: Stanford University Press, 2003. Print.
6. Livermore, David. *Leading with Cultural Intelligence: The New Secret to Success*. New York, NY: AMACOM, 2010. Print.
7. Van Dyne, Linn; Ang, Soon; and Koh, Christine. “Cultural Intelligence: Measurement and Scale Development.” In M.A. Moodian (Ed.), *Contemporary Leadership and Intercultural Competence: Exploring the Cross-Cultural Dynamics Within Organizations*. Thousand Oaks, CA: Sage, 2009. Print.
8. Livermore, David. *The Cultural Intelligence Difference: Master the One Skill You Can’t Do Without in Today’s Global Economy*. New York, NY: AMACOM, 2011. Print.
9. Ang, Soon and Van Dyne, Linn. “Conceptualization of Cultural Intelligence: Definition, Distinctiveness, and Nomological Network.” In S. Ang & L. Van Dyne (Eds.), *Handbook of Cultural Intelligence: Theory, Measurement, and Applications*. Armonk, NY: M. E. Sharpe, 2008. Print.
10. Van Dyne, Linn; Ang, Soon; and Koh, Christine. “Development and Validation of the CQS: The Cultural Intelligence Scale.” In S. Ang & L. Van Dyne (Eds.), *Handbook of Cultural Intelligence: Theory, Measurement, and Applications*. Armonk, NY: M. E. Sharpe, 2008. Print.
11. Amiri, Ali; Moghimi, Seyed; and Kazemi, Masoumeh. “Studying the Relationship Between Cultural Intelligence and Employees’ Performance.” *European Journal of Scientific Research* (June 2010, Vol. 42, No. 3). Web.
12. Earley, P. Christopher and Peterson, Randall. “The Elusive Cultural Chameleon: Cultural Intelligence as a New Approach to Intercultural Training for the Global Manager.” *Academy of Management Learning & Education* (2004, Vol. 3, No. 1). Web.
13. Bucher, Richard. *Building Cultural Intelligence (CQ): Nine Megaskills*. Upper Saddle River, NJ: Pearson Prentice Hall, 2008. Print.
14. Creque, Carole and Gooden, Doreen. “Cultural Intelligence and Global Business Competencies: A Framework for Organizational Effectiveness in the Global Marketplace.” *International Journal of Management and Information Systems* (2011, Vol. 15, No. 4). Web.



Healthcare.  
It's different.

we think. we write. you win.

800.758.9710  
optimetrica.com  
sales@optimetrica.com

**optimetrica**

© 2015 Optimetrica, Inc. All Rights Reserved



## ***Do the right things and do things right***

Training • Benchmarking/Assessments • Process Improvement  
Live Engagement Support • Staffing • Coaching/Mentorship

[www.strategicproposals.com](http://www.strategicproposals.com)

603.880.6855

**StrategicProposals**



## FACEOFF: TWO PERSPECTIVES



# PROPOSAL MANAGEMENT

In-House Proposal Managers **vs.** Outside Consultants

By Maria Vivona

**W**hich proposal manager can better facilitate an RFP response completion—the in-house proposal manager or the outside consultant? Consider a day in the life of both proposal leads to examine the factors at play.

### The In-House Proposal Manager

Charles starts his day as a Global Tech proposal manager by reviewing 20 proposal support requests. He selects a proposal from the IT solutions department and contacts the requester: sales lead, Debra. Debra provides client and proposal team member information, and Charles coordinates a proposal kick-off meeting. Once he receives the RFP from Debra, Charles forwards it to the document specialist group in India. Within 24 hours, the team receives a Global Tech–branded proposal template customized to the RFP guidelines.

Charles reads the RFP and makes notes. He creates a proposal project plan, including important dates from the RFP, such as the bidder's conference, bidder's questions

due, and response due. He also includes timelines for the Global Tech–required reviews: solution, legal, staffing, and pricing. He customizes the compliance matrix, proposal team instruction materials, and process flow chart and sends them along to Debra's team. Global Tech's proposal process dictates Charles' steps. If the proposal team members meet their deadlines for each milestone, Charles will be able to submit the RFP two days before the due date.

### The Outside Consultant

#### **Project Kick-Off**

Proposal consultant Linda meets with Steve, the project manager, at the project kick-off meeting with Specialty Tools. They discuss the expectations of her role, and Linda's proposal questionnaire provides information about Specialty Tools, its current proposal process, and Big Oil Company's anticipated RFP.

Linda creates a list of key players for each step of proposal creation. Steve admits his company has no documented proposal process and Specialty Tools has not

## In-House Proposal Manager

Pros	Cons
Established proposal process with flow chart and prewritten team instructions saves time.	Rigid process may not fit into an RFP's timeline, leading to no-bid decisions.
Proposal team members understand their roles or have access to prewritten materials explaining their roles.	Sink-or-swim environment intimidates newcomers to the process; process allows little time for individual instruction.
Several proposal tasks are spread among many groups, saving time.	Piecemealed responses from multiple departments lack customization for the RFP response.

VS

## Outside Proposal Consultant

Pros	Cons
Consultant can use experience and a proposal toolkit to start a proposal process that is then customized for the RFP response.	Client company often requests that the consultant develop and document the process as she facilitates the completion of the RFP response.
Project contract dictates hours and required meetings. Proposal team is motivated to make the best use of the consultant's time.	Project contract might not allow for longer hours close to deadline or due to changes in the RFP requirements.



### GET YOUR PROCESS INTO TIP-TOP SHAPE WITH THESE IDEAS.

- **The APMP Body of Knowledge** offers guidance in all aspects of proposal management, but consider it especially for process management.
- Prepare and **update proposal materials before the kick-off and follow-up meetings**. Meetings might change direction, but proposal plans will help the team progress steadily to meet all deadlines.

won any business from past RFP responses. Linda suggests adding two days of consulting time after submitting the RFP response, to document the process used and to conduct a lessons-learned meeting.

### *The First Proposal Team Meeting*

Linda meets with Steve and his team of four engineers. The six team members take 30 minutes to skim the 20-page RFP, released by Big Oil Company only two hours ago. The engineers jump to the technical requirements of the solution, while Linda focuses on the response guidelines and due dates. Linda uses these team meetings for collaboration and instruction. She facilitates discussion of the technical questions and assigns questions, and the team discusses its technical strategy. Linda takes notes and creates win themes. Afterward, she immediately starts working on a proposal plan, template, and compliance matrix.

### **The Verdict**

Who manages the proposal more efficiently—Charles or Linda? That is a matter of perspective. These scenarios show an ideal kick-off for both proposal managers. For the next four weeks, Charles and Linda face the possibility of missed meetings and internal deadlines, changes to the RFP requirements, and additional proposals added to the workload. There are pros and cons with each scenario, but as a proposal lead, it is up to you to decide which method works best for your combination of players, your available timeline, and the RFP itself. ●

**Maria Vivona** is a proposal writer and senior technical writer consultant for Shea Writing and Training Solutions in Houston, Texas. Maria received Practitioner-level certification from APMP in 2012. She can be reached at + [dmvivona13@yahoo.com](mailto:dmvivona13@yahoo.com).

# Outperform

making strategy reality

BidToWin is now part of Outperform, bringing you the same great ideas, same great Certification support, but new capabilities across bids, projects and programmes.

## BidToWin

We help organisations raise their bid, project or programme management capability to realise more benefits, deliver more efficiently with less risk and more certainty.

how we help:

initiation

assurance

coaching

competency development

implementing methods and frameworks

assessing maturity and raising organisational capability

## bid less, win more

Outperform  
Samuel Lindow Building  
Westlakes Science Park  
Cumbria CA24 3JZ

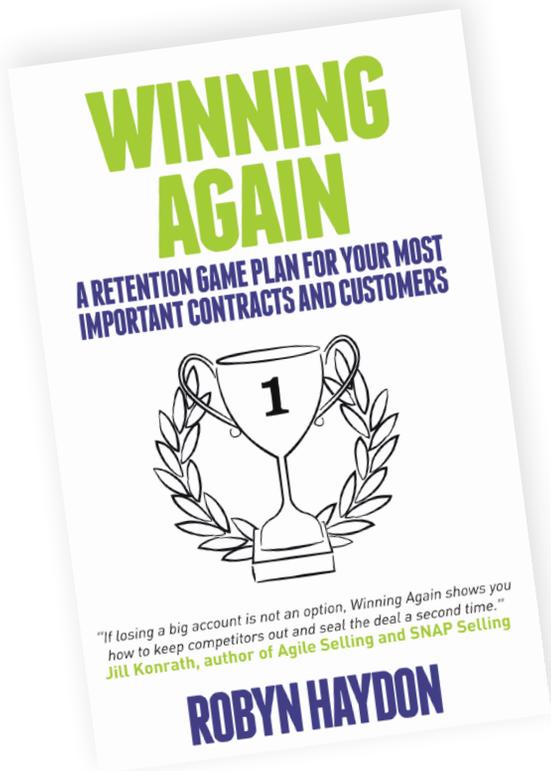


0203 432 6330

[www.outperform.co.uk](http://www.outperform.co.uk)

[www.bid-to-win.eu](http://www.bid-to-win.eu)

# Book Review



## *Winning Again: A Retention Game Plan for Your Most Important Contracts and Customers*

by Robyn Haydon

Review by Ian P. Murphy

With thousands of hours as a bid consultant under her belt, Australian writer Robyn Haydon specializes in competing for contracts worth at least AU\$5 million (\$3.9 million) over three years. But even more important than winning those contracts is keeping them.

*Winning Again* offers solid advice on how to retain business that comes up for bid again. Half of all rebids go to a new supplier, Haydon says, and with business-to-business deals increasingly procurement-driven and competitive, “Customers are constantly looking around for the next big thing and seem only too happy to move around to get it.

“My first book, *The Shredder Test—A Step-by-Step Guide to*

*Writing Winning Proposals*, was essentially about how to get your foot in the door without shooting yourself in it,” she quips in *Winning Again*’s introduction. “This book is about what to do when you’re inside—how to maintain a long-term place at the table as a preferred supplier.”

Supporting her counsel are anecdotes from experts familiar with business and government procurement as well as business development leaders

from large Australian concerns. And while a few of the acronyms are Aussie-centric, the book holds universal truths for any company wishing to keep a client.

The most successful suppliers are those who can successfully bridge what Haydon calls the “opportunity gap”—that space between the concrete and the conceptual, or what you’ve been able to deliver already and what you promise to do next. No matter how well you did the first time out, you’ll have to compete for the work again. In other words, don’t get too comfortable. It requires a sustained effort to win contracts

again and again. “Competitors are hungry, and we need to stay hungry, too,” she says.

Fortunately, incumbent suppliers have advantages over insurgents: They know more about what the customer does. Insider access allows them to learn more on top of that. And they already have a willing audience for their ideas inside the client company.

Successful suppliers, or “clear winners,” see the opportunity to serve customers as a privilege and are always on the lookout for ways to serve the customers better. And innovation, Haydon says, is the key to forging lasting customer relationships today. The difference between a short-term supplier and a long-term

**SUCCESSFUL SUPPLIERS,  
OR “CLEAR WINNERS,”  
SEE THE OPPORTUNITY  
TO SERVE CUSTOMERS  
AS A PRIVILEGE AND ARE  
ALWAYS ON THE LOOKOUT  
FOR WAYS TO SERVE THE  
CUSTOMERS BETTER.**

partner is like the difference between a tenant and a custodian, she says: A tenant may do good work, but the custodian does work that the client didn’t even know it needed.

Position your firm as an authority instead of relying on a sales pitch, Haydon says. Showcase the many talents and accomplishments that set you apart from any other company that’s bidding now or in the future.

When it’s time to submit a bid, confidently address what the customer wants most with what your firm can best deliver. “Show up like a human being who wants to help another human being, and the customer will love you for it,” she says. “It won’t be long before you find out that you’re winning again.” ●

**Ian P. Murphy** is a freelance writer based in Chicago. This is his first contribution to *APMP Journal*. He can be reached at + [APMPJournal@theYGSgroup.com](mailto:APMPJournal@theYGSgroup.com).

A graphic for the APMP Bid & Proposal Con Boston 2016. At the top, the year "2016" is displayed in a white banner. Below it, the APMP logo (a stylized globe) and the text "APMP BID & PROPOSAL CON" are centered. The word "BOSTON" is written in large, blue, 3D block letters with a white outline, set against a silhouette of the Boston skyline. Below "BOSTON" is the text "★ MASSACHUSETTS ★". At the bottom, two dates are listed: "APMP CERTIFICATION DAY MAY 24, 2016" on the left and "APMP CONFERENCE MAY 25-27, 2016" on the right, separated by a decorative flourish.

## *Saying Goodbye to a Friend*

A TRIBUTE TO STEVE JENSEN



FOR MORE THAN 16 years, Steve Jensen made significant contributions to APMP and the industry. “Not only was he a great professional, he was my friend,” remembers Eric Gregory, CPP APMP Fellow. Indeed, Steve will be remembered for “his ever cheerful and helpful approach to service” and his unwavering loyalty to our industry.

Steve was truly a giant in the industry. A seasoned proposal management professional, he brought to his work 30 years of proven bid team leadership and hands-on experiences in all facets of the proposal life cycle in the mobile telecommunications and military defense industries. He was both a personal contributor and a respected leader. He personally managed and prepared thousands of proposals and price quotes, generating hundreds of millions of dollars in revenue. And he successfully led cross-functional bid teams of up to 40 people and departments of up to 11, creating and staffing new proposal departments at two companies and implementing controls to manage high-volume workloads of up to 500 proposals and quotations annually.

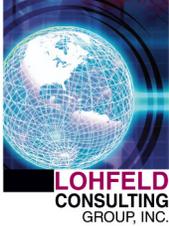
But that was the work he was paid for and paints only part of the picture of the impact made by this quiet giant. APMP knew Steve through his extensive volunteer efforts—all behind the scenes. Steve was a foundational member of APMP. In addition to serving as a committee chairperson for 16 years, Steve was a CF APMP Fellow who served the Lone Star Chapter from 1992 until his death. Since 1997,

he was largely responsible for evaluating speaker proposals and laying out the APMP conference curriculum.

Steve worked tirelessly to ensure that the annual meeting was a success. It wasn’t until last year at the APMP Bid & Proposal Con in Chicago, that Steve stepped into the spotlight for the first time to take a well-deserved bow for the work he had done. He was given a huge ovation from the hundreds of presenters and speakers he helped mentor over the years. He was also featured in the spring/summer 2014 issue of *APMP Journal* in an article called *Behind the Curtain*. There he explained what drew him to volunteer for leadership positions and put in all those extra hours: “Even though it is a lot of work,” he said, “I really enjoy it. It gives me an opportunity to meet people from all over the world, people I wouldn’t normally get to see, and I’ve established a lot of good contacts and friendships as a result.”

Those contacts and friendships will serve to fuel the legacy of this dedicated man who influenced so many through his work and volunteer services. Steve will not soon be forgotten—not by his industry, not by his colleagues, and certainly not by his family. A father of two, Steve will be deeply missed. He left us all far too soon. But his legacy will live on, certainly through APMP, but also through the many lives he touched through the years. Our heartfelt thanks and condolences go out to Steve and to his family—his family at home and his family at APMP. ●

## CORPORATE SPONSORS



## CORPORATE MEMBERS



**NEW!**

# APMP Body of Knowledge (BoK)

## YOUR GO-TO RESOURCE FOR:

- Research-based APMP Best Practices for multi-industries
- Universal terms that are vendor-neutral
- Tools and Templates
- Trends and Data
- References

BOOKMARK THE PAGE TODAY!

**FREE** for all APMP members

