

The Executive Summary

VOL IV NO. 7 AUGUST 1998



A BIMONTHLY PUBLICATION OF THE APMP NATIONAL CAPITAL AREA (NCA) CHAPTER

Special Election Held

BY NANCY NIX-KARNAKIS

NCA held a special election at the May 20 Round Table to elect half of its board members. The following was approved by voice vote:

Vice President—**Bob Crawford**, Director of Proposals at Century Technologies, Inc.

Secretary/Treasurer—**Lou Robinson**, Chief Executive Officer of Winning Proposals, Inc.

NCA Web Master—**Carl Dickson**, Vice President for Electronic Commerce Services at Optym Professional Services

Government Liaison—**Jeanne Whyte**, President of Assistech, Inc.

The NCA Board of Directors also appointed **Lee Andrese** and **Sharon Meister**, Assignment Managers with Mac-Temps, to serve as Meeting Coordination Co-chairs.

This special election was the first phase of NCA's procedure of electing half of its

board members in May and half again in November to provide overlapping and continuity among NCA officers and chairs.

Those selected at the May 20 Round Table will serve from July 1, 1998 through December 31, 1999. In November, NCA will hold a regular election for President, Membership Chair, Program Chair, and Newsletter Chair, who will serve from January 1, 1999 through December 31, 2000. Beginning with the November 1998 election, all terms of office will be 2 years, beginning January 1 following the election.

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NCA Has Gone Electronic

BY LAURA GRIFFITH, *Membership Chair*

AS MANY OF YOU have noticed, NCA is now distributing meeting notices via e-mail. This helps all of us; the chapter saves a great deal on mailing costs—money we can now use for other benefits—and members get meeting announcements promptly. We also plan to use e-mail for other announcements of interest to our membership and occasionally to ask our members for feedback.

So that our messages aren't lost among the large amount of "junk" mail we all get from time to time, we will always begin the subject line with "APMP-NCA."

While we will continue to mail announcements to those without e-mail for a short time, we will soon go to a full e-mail

distribution. If you have not been receiving NCA e-mail, we probably do not have your correct e-mail address. Please contact Laura Griffith (laura.griffith@TRW.com) to provide your e-mail address and to confirm your title, company, mailing address, phone number, and fax number for our records.

MISSING IN ACTION

The following is a portion of our current NCA "Missing In Action List"—people with whom we have lost contact. If you know any of these members, please ask them to get in touch with Laura Griffith (laura.griffith@TRW.com) and provide their current e-mail, title, company, address, phone number, and fax number. If you know that any of them have moved from the area or have

Continued on page 3

APMP National Capital Area (NCA) Chapter

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President's Corner

by Jo Manson

IT WAS REWARDING for NCA and its board members at the national conference in April in Colorado Springs to meet and network with other APMP chapter members from across the country. We were asked to give a presentation of our best practices and lessons learned as APMP's largest (and second oldest) chapter. We had many opportunities to discuss how other chapters operated and discovered a tremendous variety in chapter meeting conduct, location, time of day, etc. It was clearly evident that we had a common objective about meetings—addressing the members' needs and planning and conducting meetings in a way that meets those needs.

It was amazing to me how so many chapters operate effectively using a variety of meeting venues. Some chapters have informal and free brown-bag lunch meetings while others prefer to meet on Saturday mornings. Still others meet in the late afternoon at an office site.

Clearly, everyone agreed that the primary incentive to attend meetings is the content of the program. Without interesting content and good speakers, meeting attendance diminishes. Many chapters commented on the challenge of coming up with meaningful programs. We at NCA continue to look for effective programs, and you will be receiving a survey asking for your feedback and com-

ments about our programs. Please take the few minutes it takes to fill out and return this survey. Addressing your input and support is one of our top priorities.

However, don't feel that your feedback should be limited to comments about meetings. Feel free to contact any board member if you have ideas for improvements or changes we should consider. We try our best to meet the needs of the many, but will always consider alternatives if they are reasonable and manageable for a volunteer organization.

I look forward to seeing you at our upcoming meeting and hearing your suggestions for strengthening our chapter.

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Missing in Action...

Continued from page 1

left the industry, please tell Laura so we can remove them from our database.

Kathleen C. Dawn, Jon D. Dellaria, Peter Dube, John H. English, Bernadette Ford, Yvette M. Foucher, Eliza-

beth K. Fry, Lisa M. Greenberg, Robert M. Hansen, Zell F. Hudson, Lucinda J. Kaltenborn, Susan Kuplinski, Elizabeth P. La Pilusa, Dag T. Larsen, Carolyn G. Lobosco, Robert L. Maschner,

Peter L. McLeod, James D. Christopher Medwin, Jack Mencia, Roger B. Michaud, George A. Mohr, Alan M. Montgomery, Paul A. Muller.

Thanks for your support!

The Year's Best Actual Headlines

(Yes, they are real!)

BY JAMES E. BOYCE

1. Include Your Children When Baking Cookies
2. Something Went Wrong in Jet Crash, Expert Says
3. Police Begin Campaign to Run Down Jaywalkers
4. Safety Experts Say School Bus Passengers Should Be Belted
5. Drunk Gets Nine Months in Violin Case
6. Survivor of Siamese Twins Joins Parents
7. Iraqi Head Seeks Arms
8. Prostitutes Appeal to Pope
9. Panda Mating Fails; Veterinarian Takes Over

10. British Left Waffles on Falkland Islands
11. Lung Cancer in Women Mushrooms
12. Eye Drops off Shelf
13. Teachers Strike Idle Kids
14. Clinton Wins on Budget, but More Lies Ahead
15. Enraged Cow injures Farmer With Ax
16. Plane too Close to Ground, Crash Probe Told
17. Miners Refuse to Work After Death
18. Juvenile Court to Try Shooting Defendant
19. Stolen Painting Found by Tree
20. Two Sisters Reunited after 18 Years in Checkout Counter
21. Killer Sentenced to Die for Second Time in 10 Years
22. Never Withhold Herpes Infection from Loved One
23. War Dims Hope for Peace

24. If Strike Isn't Settled Quickly, It May Last a While
25. Cold Wave Linked to Temperatures
26. Deer Kill 17,000
27. Enfields Couple Slain, Police Suspect Homicide
28. Red Tape Holds up New Bridge
29. Typhoon Rips through Cemetery; Hundreds Dead
30. Man Struck by Lightning Faces Battery Charge
31. New Study of Obesity Looks for Larger Test Group
32. Astronaut Takes Blame for Gas in Spacecraft
33. Kids Make Nutritious Snacks
34. Chef Throws His Heart in Helping Feed Needy
35. Arson Suspect Held in Massachusetts Fire
36. Ban on Soliciting Dead in Trotwood
37. Local High School Dropout Cuts in Half
38. New Vaccine May Contain Rabies
39. Hospitals Are Sued by 7 Foot Doctors

Calendar of Events

The purpose of the calendar is to apprise NCA members of upcoming events of interest to proposal professionals.

AUG	17	NCMA	• Oral Proposals	800-344-8096
	19-20	NCMA	• Source Selection: The New Process	800-344-8096
SEP	16	NCA Roundtable	• Deputy Under Secretary of Defense for Acquisition Reform, Mr. Stan Soloway, will speak on the DoD Guide to Collection and Use of Past Performance Information	703-383-7920
OCT	14-16	NCMA	• Source Selection: The New Process	800-344-8096
	23	NCMA	• Oral Proposals	800-344-8096
	15-16	NCMA	• Past Performance and Best Value in Source Selection	800-344-8096
NOV	9-10	NCMA	• Subcontracting—A Teamwork Approach	800-344-8096
	18	NCA Roundtable	• Topic: TBD; Corporate Partner Night	703-383-7920
DEC	9-11	NCMA	• Source Selection: The New Process	800-344-8096

ATTENTION PROPOSAL CONSULTANTS

BY DENNIS FITZGERALD

HAVE YOU DONE THE MATH? You can join APMP, attend all six local bimonthly meetings, attend the National Conference, run a 1/3-page self-promotion in the *Executive Summary* and **still come out ahead!**

Think about it! Let's say an average consulting job is worth \$2,750, based on a \$25-per-hour rate and the typical 110% commitment to a proposal. Now look at the active membership costs:

Member Benefit	Cost
Membership	\$75
Roundtables (6 @ \$35)	\$210
Annual conference registration	\$500
Air fare to the conference	\$500
Total cost	\$1,285

The total cost of membership and all of the benefits—the potential it carries of furthering your education and career—is **only \$1,285.**

That leaves you \$1,500 for shameless self-promotion. You can run a 1/3 page ad in the *Executive Summary* and **get an entire year of local exposure for only \$650.** With what's left, you can even afford a 6-time, 1/3 page ad in the national newsletter, *Perspective* (\$650 more), which will get you national attention (ideal for those who like to travel). That still leaves you **\$200 profit** and look what you have to show for it:

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Want to be seen by other proposal professionals? See our new advertising rates and special ad sizes for the *NCA Executive Summary*. Ask for a copy of our Ad Kit. Contact Dennis Fitzgerald at 703-533-7209 or e-mail tfhcva@aol.com

Are You Still Beating Your Spouse? *Handling Hostile Questions in Proposal Orals*

BY TOM LEECH

MOST PROPOSAL ORAL presentations include an impromptu question-and-answer (Q&A) segment when members of the Selection Review Board ask the presentation team about details in the proposal. The Q&A can be as critical to success as a well crafted formal proposal. And the exchange usually requires at least some spontaneity—you may not anticipate all of the questions and have not prepared and rehearsed responses to everything, yet you must give knowledgeable, effective answers or know the subject well enough to refer the question to another member of your proposal team.

No doubt, the so-called "hostile" question is potentially the most risky part of a Q&A, and here the spontaneity factor is critical. Many RFPs specify that only "clarification questions" will be asked, making a serious attack unlikely; but when RFPs do not so specify, particularly in many commercial procurements, client review members can come in like killer-sharks.

Often, team and individual responses are vague and ill informed, resulting in the sad refrain, "We lost in the Q&A." I have found that careful consideration of the following tips can result in the happier: "No question, we won it in the Q&A."

"Your company has recently been sold to a foreign firm. How do you see that affecting your ability to carry out and manage the proposed sensitive contract?"

The basic rule: Thoroughly prepare.

It seems an obvious requirement, but too often speakers—even those who give great oral presentations—fail to fully prepare for the Q&A. All parts of the orals, especially the Q&A, should be thoroughly tested and rehearsed with a knowledgeable internal review team. If you want to draw troublesome questions, showing up ill prepared is a good way to achieve that.

Don't minimize Q&A preparation. Make Q&A a critically important part of your development plan, and allot plenty of time to get it right, with specific time blocks and milestones. Then—the tough part—stay on schedule.

Insist that all speakers read all of the written proposal (Wow!). It is embarrassing for the speaker who is asked about a particu-

lar part of the written proposal or states something contrary to what has been written. It becomes obvious to all that the speaker has not read the proposal, especially if the speaker cannot speak at all about the issue or even refer the question to another member of the offering team.

Train your team and hold their feet to the fire! Have knowledgeable team members anticipate questions, including confrontational ones, and extensively prepare and test presenters in rehearsals.

"So, now that we've heard that wonderful plan, could you explain your major schedule delays on Project XYZ in 1984?"

Be a cohesive team during Q&A

Assign a Q&A Manager. The Program Manager is usually the best candidate, because the PM generally has the perspective of first-hand experience with the customer's environment (presumably more so than the other team members). As the Q&A manager, the PM either fields the question or assigns it to a team member, except when the question is explicitly addressed to another person.

Engage brain before mouth. Before answering, take time to understand the question and to *think*. Listen intently and completely. Be sure you clearly understand what has been asked. If the question is at all ambiguous, ask for clarification and then paraphrase it back to the reviewer, and get agreement.

Don't leave your team member to sink or swim all alone. Make sure other team members are ready to engage in the exchange or support whoever is taking the question, with the PM as director.

"You show Smith as Operations Director. When we awarded your company a similar contract, Smith was designated the same, but never showed up. Could you clarify the commitment this time?"

Manage tough questions gracefully.

Refrain from being defensive or overly aggressive and contentious. Recently one presenter came away saying, "Boy did we show them!" forgetting that the idea was to win a *contract*—not one argument with the Selection Review Board. Rehearsals are a must for identifying and toning down argumentative or antagonistic tendencies.

Once you clearly understand the question, answer calmly and coolly. If permitted,

it helps to have graphic materials for backup, ready to add further detail or clarification.

Reflect on the question and look for hidden meanings, premises with which you disagree, or information you believe to be incorrect. "Since X is the cause of Y, what are you going to do to upgrade X?" If you find problematic commentary embedded in the question, address it and clear it up before proceeding with the answer.

Rehearse these problem questions exhaustively. Know what happened on similar contracts, be fully conversant about the issues and problems that arose, and be comfortable talking about them and how they were dealt with.

If the thorny part of the question is right on—say your team did botch it up before—acknowledge it and make lemonade from the lemon. Be able to say, "As a result of the lessons learned from that experience, we have developed the following (system, procedures, review process, whatever), which is a real value-added feature of our current offer...."

Reflect on your answers and be sure that they have fully defused any negatives. Check the Board members' body language. Is anyone still wearing a sour expression? Ask if

further explanation is in order.

Head off the rotten apple syndrome. Don't let one bad experience with a particular issue pollute the major thrust of the proposal. Wrap up the session with a positive close from the PM, reconfirming why your offer is truly a winner.

"You show you can complete this sub-task with only 3 people. Given that when we awarded you the last contract, a month later you asked for more money, how realistic is your staffing plan?"

Never give up!

Pay attention to meeting dynamics. With some procurements, you may have the opportunity to rebound and rectify a perceived poor Q&A performance.

- Have someone keep notes on questions and the nature of the interaction.

- Conduct a team debriefing immediately following the presentation to discover and review any negatives.

- Develop a recovery plan and come up with some fixes to make a better offering if within the rules. For example, if further discussions or BAFO follows where changes are appropriate, here's your chance to make an improvement. Following a heavy grilling by the Re-

view Board, one PM was crestfallen. "They killed us!" he moaned. After extracting the arrows, the team made some changes. He called later and shouted "We won!" Lovely words to hear.

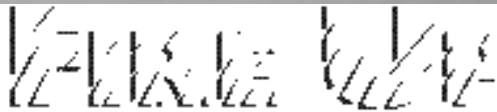
"Your proposal spells out what appears to be a sound safety plan. Could you explain why it failed to prevent the accident on your Greensburg site where three people were killed last month?"

Engage the services of spiritual consultants and conduct frequent team rituals to head off questions such as the above.

Finally, one of the most unnerving Q&A experiences of all is when they don't ask anything.

Good luck.

Tom Leech, through his San Diego-based presentations consulting firm, Thomas Leech & Associates, has provided hands-on coaching and training for proposal orals and other major presentations for nearly 20 years. With a previous career with General Dynamics in business development and engineering, he's consulted with many high-tech firms pursuing contracts from DOD, DOE, and other public agencies, plus commercial firms. He is author of How To Prepare, Stage & Deliver Winning Presentations (AMACOM) and a co-author of The Nine Keys to Winning Proposals (Positioning to Win).



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Your Most Pressing Questions

BY FRANK J. GRECO, Ph.D.

The following questions were asked by a proposal manager of a large government contractor.

How do I handle multiple, conflicting revisions to the same paragraphs, and even the same sentences, of a technical proposal after a team of "experts" reviews my latest draft?

This is a common dilemma. During virtually every pink- or red-team review, we encounter this common phenomenon from competent, expert reviewers. Here are some tips:

Know the reviewers. If possible, learn each reviewer's background, previous experience, specialty, education, and training to appreciate individual perspectives. Knowing who is management-oriented and who is more concerned with technical issues can be very helpful. Comments from managers can address a range of issues that seem far removed from technical concerns. Red-team revisions reflect different viewpoints involving editorial, cost, quality, and functional (specialist) issues. Stay calm and appreciate your own vantage point. At least you're not operating in a groupware, document-update environment, where the advantage is given to the last person to enter a revision. Imagine that you are the funnel of resolution, burdened with the ultimate, corrective decision, but empowered with the wisdom of King Solomon: you hold the Ace—the Evaluation Criteria.

Resolve the Conflict. As an initial step, validate and accept appropriate editorial, grammatical, and

style changes. Question revisions that change the order of sections or paragraphs, and maintain a critical, logical flow. Reject such changes if they conflict with the order of evaluation score or if they do not accord with the solicitation instructions. For significant, nontechnical conflicts, refer to the Evaluation Criteria and eliminate the least significant comments that do not improve your score. If conflict remains, consider the perspective of the different reviewers. Two conflicting reviewer comments can, paradoxically, both be correct. For example, if one reviewer says, "this contains too much quality management and meaningless rhetoric", while the other demands that you "add more quality control, assurance, auditing and verification here," they may both rightly be addressing valid evaluation criteria issues. So do both revisions: remove all of the irrelevant quality discussions from the original paragraph and focus on the major theme originally needed for an increased evaluation score. Then you may add a new paragraph, possibly after your newly revised paragraph, addressing the salient quality features and presenting a compelling quality-oriented story. You also can soft-peddle the "motherhood" verbiage and unsubstantiated boasting in the new insert.

Meet with reviewers. Technical conflict, especially from specialists or functional reviewers, cannot be handled so easily. For example, say one person describes the proposed communications system as having one main processor with nine file servers in a LAN star configuration, and another says, no, it's three main processors and four file servers in a WAN token ring configuration, and you know that it cannot be both. Conflicting technical matters that cannot be resolved by referring to the evaluation statements require definite corrective action and cannot be swept under the war-

room rug. When you know the identity of the reviewers, meet with them, preferably simultaneously, and explain your dilemma. If they are not accessible, retain the counsel of a competent technical lead associated with the project. Or confer with the nontechnical lead, such as the Proposal Manager. Some nuts are not easily cracked and it is wiser to direct your energies toward the best possible evaluation score, given the limited amount of time, instead of climbing a broken Jacob's ladder. Multiple, conflicting comments from review teams are a challenge. My colleague once said, "Red Team Review Repair, especially with the limited time allocated, is a real bear." I disagreed in jest, and replied "I see it as an Elephant; the only way to consume this animal, is one bite at a time."

How do you explain that the clock always runs out and we fail to have sufficient time to clean up the minor problems with our technical proposals? We seem always to work up to the last minute, regardless of how much advance planning and preparation we do. Almost every time, just before we put the proposal in the box, we are fixing, correcting, and wishing we had more time for last minute clean up.

You may be asking: "How can we do more than the best we can do in the allocated time?" The Answer is, you cannot; the best you can is reasonably only the best that you could do. This is not a perfect world, and uncertainty, a vital ingredient in our reality, will cause unexpected surprises, robbing you of extra time you desire to accomplish those last minute improvements. There are innumerable improvements and corrections, which would contribute to a compelling, concise, complete, coherent, and flawless final document. Consider Zeno's paradox: constantly traveling halfway to the wall of per-

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fection, and never getting there. You must manage the inevitable unknown, despite elaborate contingency plans or planned time reserved for the unexpected. Effective planning, allowing a few extra days to polish a proposal submittal, appears to be a plausible solution. However, known unknowns, and unknown unknowns, quickly erode any reserved time. Furthermore, too much contingency time compresses the development schedule to a fault, preventing the best you can accomplish in the shortened time span. Plan for the worst, but be prepared to do your best. Obviously, one solution involves additional staff and resources, but they may be beyond your grasp, possibly for legitimate reasons, because there is always a budget ceiling at which the return on the proposal investment is a losing proposition. Always attempt to reserve extra resources, but depending on them as your last alternative is risky. This question therefore reduces to: are you doing your best, all things considered? Consider the following:

- Are the proposal team members competent and reliable?
- Are computer, documentation, and production resources available and can they accommodate surges in the work flow?
- Do you set or influence the initial budget appropriately and at a workable level?
- Do you have redundant and work-around plans at stall points?
- Are you effectively monitoring the critical development path?
- Do you expend excessive time on trivial or in-

significant matters?

- Do you retain corporate support to solve your unexpected problems?

- Are you consuming time doing unnecessary rework, or are there delays or disruptions in the work?

These underlying issues affect productivity, and they apply more times than not. Furthermore, these issues, when appropriately addressed, effectively use resources and energies, which ultimately increases the evaluation score. As you get closer to the deadline, constantly prioritize and re-prioritize the outstanding problems to determine which ones should be solved or addressed first, with the focus on getting a higher evaluation score. That way the issues that go unattended will have little affect on the final score of the document you have packed in the box. You can come closer and closer to Zeno's wall, but you cannot stop the clock. Proposal writing is as much an art as a science. As Leonardo da Vinci once said, "No work of art is ever complete, just abandoned."

Every revision, every attempt to polish, correct, and improve consistency gets you closer to the wall of perfection, but does not necessarily get you a higher evaluation score. If a bidder were given four months for proposal development versus the usual one or two months, the conscientious offerer might revise and revise until the point of diminishing return. Yet in reality, we often have less time than we need, but enough time for what we want. Every time we revise the proposal document, we see a stronger light at the end of a tunnel. You cannot reach the wall, nor do you need to; you cannot

change the delivery time, even though you want to.

When producing a proposal, time is your only limited, predefined, and persistent enemy; but it is also an asset. A proposal is a chronological battle with time. The technical performance and quality of the offer, whether good or bad, compliant or not, is a function of the capability and efficiency of the proposal team. Asking for more money or resources, at some point, has its own inherent diminishing return. The tricotomy of Time, Cost, and (Technical) Performance can be universally applied to most engineering, writing, social, and political issues. Of the three, the hardest to control is time. From an operation perspective, since time and the budget are fixed, you must attempt to increase the productivity of the team to attain a higher quality proposal. Work on the productivity—a combination of strategic and economic processes and planning the frequent and effective improvement of proposal drafts.

Greco Research Engineering Company, Inc. (GRE), is a Virginia-based consulting firm, specializing in New Business Identification, Federal Government Procurement and Proposal Preparation. GRE Founder, Dr. Frank J. Greco has nearly 30 years experience in proposals and business development. During the last 12 years GRE has participated in over 150 federal proposals and \$5 billion of procurement for over 200 different companies, including some of the largest federal contracts. Check out their Web site at <http://www.grecoinc.com>

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Delivering the Mail

How to Nail Down Compliance

BY RICH FREEMAN¹

THE SAYING HAS BEEN around for a long, long time. It probably came from some wisened, gray-haired proposal person who was trying to explain to the writers that their writing wasn't saying exactly what the customer wanted to hear. It probably came out something like, "You are writing a lot of letters, but you ain't deliverin' the mail." You'll hear this quote a lot when you're working with other wisened proposal people who have learned how to lose, the hard way.

A Step-By-Step Review of the RFP Shredout Process

The "shredout" (or decomposition) of the RFP is really a simple process. We save the RFP files as archive documents, so that we always have an original copy, then make a copy in a new file or files we call "RFP Outline."

We reduce each paragraph in the new document

to simple statements in outline form, and, as we are reviewing the material, we add comments or questions about compliance.

When finished outlining and making notations, we save the file and it becomes the writing outline for the response. Later, after compliance review, we will turn the RFP Outline into a Response Outline.

Next we copy (save) the RFP Outline and make a new document we call "Compliance Matrix."

Then we cut any "Section M" or "Section L" statements from the Compliance Matrix document and paste them into two new documents we call "Submission Format Requirements" and "Evaluation Criteria."

The text in the Compliance Matrix document is then further edited into concise, single-sentence criteria statements, which, although brief, must fully describe the actual requirements. Requirements that appear in only one place in the RFP but apply to several different sections of the response are copied and placed into the appropriate sections of the RFP Outline and the Response Outline.

Following this process, we convert the line-item criteria statements into a word processing table with as many rows as there are line items and columns for who is responsible for them and when, etc. Because word processing tables are memory-hungry critters, we then copy and paste the table into a spreadsheet such as Excel, and then format it and call it the Draft Compliance Matrix.

Compliance Review

One or more fresh sets of eyes will compare the original RFP to the Draft Compliance Matrix. This very important step is called a "Compliance Review." Once the compliance items have been reviewed, revised, and approved, the spreadsheet document is saved as the Final Compliance Matrix.

The Compliance Matrix is used to show where compliance statements in the Reponse are located for each compliance line item. If the Response is a large and complicated document, we send appropriate sections of the Compliance Matrix to the authors to make sure that they reply to all compliance items. Editors also receive a copy of the Compliance Matrix so that they can double-check that responses to compliance items are clear and concise.

We usually assign the task of Final Compliance Check to one or more of the members of the final review team.

The Final Compliance Matrix is sometimes published and submitted with the Response as a separate Compliance Check Sheet (to make the evaluators' job easier, and to improve their accuracy). Sometimes we put the Compliance Matrix in an Appendix and refer to it in the Executive Summary and in the rest of the Reponse.

¹*From *How to Lie, Cheat and Steal Your Way to a Winning Proposal: 51 Secrets of Master Craftsmanship*. © Copyright 1996 Rich Freeman

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