

The Executive Summary

VOL IV NO. 5 MARCH/APRIL 1998



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

Quick Start Proposals Out of the Brown Bag

BY JEANNE WHYTE:

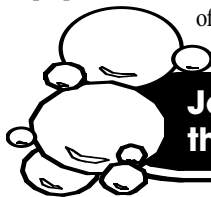
No one will ever say our Brown Bag lunches lack for lively discussions. Our scheduled topic for the February 11th meeting was "Techniques for Getting Your Proposals Off to a Quick Start." As everyone was filtering in and getting settled, Bob Crawford asked questions about the history of our chapter for an upcoming article he was writing for the *Executive Summary*. His questions

led us to a 45 minute discussion about what our chapter can do to keep pace with an ever-changing proposal industry.

Specifically, we looked at some of the reasons APMP's membership growth has stagnated in the last two years. Lois Pfeiffer may have hit the nail squarely on the head, when she suggested that more proposals are now being written by other groups within companies, e.g., most task order proposals are written in the operations group. We concluded that we should set a goal to broaden our Roundtable topics to include subjects of interest to operations, new business development, as well as proposal folks, in order to attract the full spectrum of proposal writers out there.

vides for version control, e-mail, and can even be used as a data warehouse using Open Text's server.

The two main issues involved with these kinds of tools are security and cost. Security can be controlled through firewalls and the use of temporary passcodes. The software is purchased and you pay a fee for each seat. Depending on the size of your company this might get expensive. Since writers are often identified and selected at the last minute, this method of distributing the proposal information allows for late-comers to jump in and have access to everything they need right from their desktop. For more information on Livelink see the Open Text Web page at <http://www.opentext.com>.



Join us on March 18, 1998 to help celebrate the Fifth Anniversary of the NCA Chapter.

Our discussion then turned to our scheduled topic with an unusual twist. As it turned out, Lois had some great insights on her successful use of Internet tools for proposal management. There are COTS tools available that facilitate your own virtual proposal center, whether or not you have your own server. For example the Open Text Corporation's product, called Livelink, provides software for sharing outlines, writing instructions, and pro-

Our next Brown Bag is scheduled for Wednesday, March 25 at 11:30 a.m. at ANSTEC. The topic will be Determining the Competitive Range, as defined by the FAR Part 15 rewrite. Please register by e-mail to jwhyte@erols.com ■

Jeanne L. Whyte is President of Assistech, a proposal development and marketing support company based in Tysons Corner, Virginia.

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A BRIEF HISTORY OF THE NCA

BY ROBERT CRAWFORD

How a Vision Begins

The National Capital Area (NCA) chapter is celebrating its fifth anniversary in March 1998. The idea for a local Washington Area Chapter of APMP began with a chance encounter of Dennis Green and Rick Rider at a meeting of the Washington Breakfast Club in early 1992. Dennis said that he first learned about APMP from a fellow consultant who worked with him on a job in

Annapolis in 1991. The first function he attended was the national conference in Monterey, CA in May 1992. At that conference, he made a presentation on Executive Summaries, was elected Director of the Eastern Region, and attended his first meeting of the national board. Later, Dennis, Chuck Sheridan, and David Winton held a brainstorming session to organize the Washington Chapter of APMP. Back in the D.C. area Dennis Green held

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President's Corner

by Jo Manson

Membership Appreciation

March 18 is our annual Membership Appreciation Night and we are looking forward to celebrating with all the wonderful members in our local chapter. We have much to celebrate this year because it is also the fifth birthday of our chapter.

Wow! Can you believe it? Five years of outstanding growth, fellowship, networking, and development. As the APMP's largest and second oldest chapter, we have our members to thank for this unique accomplishment. We hope to see all of you at the upcoming meeting where we

will have special gifts for all who attend including outstanding door prizes and a FREE ticket to the upcoming national conference. However, you must be present to participate in the drawing.

Our special program for the evening will be on Reward and Motivational Practices throughout the proposal process (something we can all relate to, right?). So come on down, bring your business cards, and join us for a wonderful evening of celebration and fun!

Laura Griffith, New Membership Chair

At our meeting we will also be introducing a new board mem-

ber, Laura Griffith from Vinnell Corporation. Laura will be assuming the position of Membership Chair from Lois Pfeiffer. For the last year, Lois has done an outstanding job of serving as our membership chair. She has done an outstanding job and has also actively supported our brown bag events and hosted our board meetings at NCI.

Lois and Laura have been working very closely to transition this very important position. Please join me and other board members as we thank Lois for her outstanding work and welcome Laura to this challenging and important role in our local chapter organization. ■

Southern Accents

Chuck Keller, Chapter Chair and Conference Chair of the Georgia Chattahoochee invites all NCA Chapter Members to the Southern Proposal Accents, 1998.

"For the second straight year, you can take a break from your proposal pressures to relax with your peers—some of them with southern accents, y'all—and hone your proposal skills. And you can do it in great place to visit—Atlanta"

The Georgia Chattahoochee Chapter of the APMP will hold its second annual proposal conference on Friday, March 20, 1998. The conference will feature presentations on a variety of hot proposal topics, including information about proposal technology, management, development, strategizing, and staffing. Registrants will also receive conference presentation materials, and as a bonus, opportunities and information to obtain proposal training, software, and publications.

Held at the Wyndham Garden Hotel, Perimeter Center, Atlanta, the day-long event includes a continental breakfast, a buffet lunch, and afternoon refreshments. The conference is advanced registration only and you can register for either a full-day or half-day session. A room discount is offered to conference registrants staying at the hotel.

The conference features seven program presentations and a special welcome from the APMP CEO, Marianne Gouveia.

Lockheed Martin Aeronautical Systems Company, Shipley Associates, BE&K, Inc., The Sant Corporation, and Holbrook & Kellogg.

For more information about the conference program or registration, contact Tommy Thompson, Chapter Secretary/Treasurer, telephone 770-516-7131, or e-mail tthomp1022@aol.com; or Chuck Keller, Chapter Chair and Conference Chair, telephone 770-977-3878, or e-mail chkpdt@aol.com. ■

Conference Agenda

Proposal Automation: Threat or Opportunity?—to include a demonstration of ProposalMaster 4.0 software for building formal proposals, sales letters, responses to RFPs, and presentation slides by Tom Sant, President and CEO, The Sant Corporation, Cincinnati, OH.

Developing and Tailoring a Proposal Process for Commercial Proposals: by Russ Masters, Vice President and Director of Consulting, Shipley Associates, Punta Gorda, FL.

Six Reasons Why Proposals Don't Make the Grade: by Don Helgeson, Proposal Consultant, Huntsville, AL.

Using Cognitive Support Software to Develop a Winning Proposal Strategy—to include a summary of Wiseware Proposal Strategist™ software: by Dale Johnson, President & CEO, Wiseware LLC, Boulder, CO.

Competing Against Uncle Sam for U.S. Government Contracts: by Tom Stover, President, Stover & Associates, Marietta, GA.

Preparing and Translating Proposals for International Audiences: by Mike Cooper, President of Global-Doc, Inc., Atlanta, GA; and Judy Cardwell, Proposal Manager, BE&K, Inc., Birmingham, AL.

Georgia Chattahoochee Outsourcing Trends for Proposal Development Services: by Marianne Gouveia, Director of Business Development Service, CDI Corporation, Phoenix, AZ, and Bill Painter, Director of National Sales, CDI Corporation, Acworth, GA.

The full-day APMP Member price, including breakfast, lunch, and afternoon refreshments, is \$80. The full-day non-APMP member registration is \$95.

A Brief History of the NCA...

From page 1

additional small group meetings, some in the living room of his home. From there he drafted volunteers such as Jeanne Whyte, and the NCA Chapter was born.

From Concept to Reality

The new (but unofficial) NCA held a series of roundtable meetings in the Fall of 1992. These meetings covered subjects of interest to the current and prospective APMP membership, and began to draw increasing attendance. As interest in the Washington area grew, the core group drafted a Petition for Chapter Incorporation. The core group held elections and submitted their petition to the national board in late

March 1993. The petition carried the signatures of five "acting" chapter officers and forty-nine others. In addition, the petition included a list of the 125 current APMP national members in the DC area and a list of 418 prospective members. In April the national board accepted the petition and NCA became the second chapter within APMP.

The initial NCA officers were:

Chairman/President-**R. Dennis Green**
 Membership/Services-**David A. Isquith**
 Secretary/Treasurer-**Rick Rider**
 Marketing/Promotion-**George Plank**
 Programs/Events-**Fred C. Hines**

During this period of development and growth Jeanne Whyte, Steve Shipley, and Eric Gregory made particularly noteworthy contributions in time and effort. Jeanne Whyte was the conference and meeting organizer. Steve Shipley provided exceptional insight into meeting content and speakers. Eric Gregory (and his wife Mary Ellen Gregory) began publishing the *Executive Summary*, the NCA membership newsletter.

During the first year, one of the main activities was the planning of the national conference held here in Washington, D.C. in May 1994. More than 400 APMP members from across the United States gathered for this event. The keynote speaker was Dr. Steve Kellman, then Director of the

Calendar of Events

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

MARCH	18	NCA Roundtable	• Reward and Motivational Practices; Membership Night	703-383-7920
	19	Advantage Consulting	• Business Development Workshop	703-642-5153
	25	NCA Brown Bag	• Determining the Competitive Range	703-883-2590
	26	Advantage Consulting	• The Essentials of Government Project Management	703-642-5153
APRIL	2-3	ESI International	• Past Performance	703-558-3010
	6	NCA Board Meeting		703-383-7920
	9	Advantage Consulting	• Government Contracting for Proposal Managers	703-642-5153
	14-16	Century Planning Associates	• Technical Proposal Training	703-790-0140
	16	Advantage Consulting	• Business Development Workshop	703-642-5153
	16-17	NCMA	• Past Performance and Best Value in Source Selection	703-416-4100
	16-17	ESI International	• Procurement and the Internet	703-558-3010
	16-17	ESI International	• GWACS, IDIQ Contracts, and Schedules	703-558-3010
	23	Advantage Consulting	• The Essentials of Government Project Management	703-642-5153
	27	APMP	• National Conference, Colorado Springs	909-659-0789
27-28	ESI International	• Oral Presentations for Best Value in Source Selection	703-558-3010	
MAY	10	Advantage Consulting	• Proposal Development Workshop	703-642-5153
	20	NCA Roundtable Dinner	• To Be Determined	703-383-7920
	21	Advantage Consulting	• Advanced Pricing for Government Proposals	703-642-5153
JUNE	8	NCA Board Meeting		703-383-7920
	18-19	ESI International	• Oral Presentations for Best Value in Source Selection	703-558-3010
AUG.	7	NCMA	• Oral Proposals	703-416-4100
OCT.	15-16	NCMA	• Past Performance and Best Value in Source Selection	703-416-4100
	23	NCMA	• Oral Proposals	703-416-4100

Interested in Getting Hooked Up and Tuned In to the NCA?

VOLUNTEER FOR SOMETHING!

Membership Roundtables, Brown Bag meetings, and Regional or National Conferences are great ways to find out what's going on in the industry not to mention a good opportunity to network.

But, if you really want to find out "in-depth" stuff, volunteer for something. And, while you're helping the association, you get some real "quality" time with other people who may just know about and mention something to you that you aren't going to get at a more formal meeting.

Want to find out more? Just call or e-mail any one listed on page two of this newsletter. Tell them "Uncle Sam sent me."



Office of Federal Procurement Policy. At that time, Dr. Kellman provided the leadership for many of the important changes in the Federal Government's procurement policies—particularly in the highly technical areas. Dr. Kellman introduced the NCA Chapter members to the new changes in past performance requirements as mandatory evaluation criteria.

The Second Year

In the second year, Jeanne Whyte was elected President. The NCA ran a very successful job bank and initiated the Corporate Partners program. During that second year, attendance at the roundtable dinner meetings ranged from 60 to 125 people.

Year Three

Year three for the Chapter proceeded under the leadership of Russ Carstensen. NCA initiated efforts to develop a certification program for proposal professionals. The program initiatives of the first two years were continued and strengthened.

The Fourth Year

Nancy Runnels took office in March 1996. This was an unusual year for the NCA, but a typical one for many growing organizations. Membership partici-

pation in volunteer support for NCA activities and programs seemed to sag. In the words of one long-time NCA member, Nancy was nearly a one-person Board of Directors. Despite the challenges, the Chapter continued successful member Roundtables, including some important groundwork on presentations on the new trends in Oral Presentations to the Federal Government.

The Fifth Year

Jo Manson of BTG began her term as NCA President in 1997, and began expanding the volunteer participation in the local Chapter activities, along with NCA stalwarts such as Lois Pfeiffer, Nancy Nix-Karankis, Jeanne Whyte and Linda Mitchell. In October, Rich Freeman and Dennis Fitzgerald began to reorganize and re-design the Chapter newsletter.

The Future

One of the biggest accomplishments is the new direction the NCA Chapter has taken to increase the number of active Board Members and redistributing the tasks that every volunteer organization faces. This includes reorganizing the election methods and timing personnel changes, as well as an increase in the direct participation of Corporate Sponsors in directing the organization. ■

PROPOSAL DEADLINES???

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Change is Good!

BY NANCY NIX-KARNAKIS

In December 1997, the NCA Chapter Board of Directors voted to change both the date for elections and the terms of office for members of the Board of Directors. Both past and present board members have expressed frustration with the lack of continuity from one board to the next and not having enough time to plan the next year's activities or complete Chapter projects in their term of office. Here are highlights of the changes.

Move Elections to November

With elections in November, new officers and chairs will be able to attend one or two board meetings with the exiting board members before taking office on January 1 of each year. This also synchronizes the start of the term of office with our fiscal year, which begins on January 1 of each year.

Stagger and Extend Term of Office

We also decided to provide a pool of knowledge for new board members by making the terms of one-half of the positions expire each year. This means that we will have members with a full year of experience

working with the new members. To give board members more time to do long-range planning and have time to execute their programs, we extended the term of office to 2 years. Current board members agreed to extend their terms of office to fit the transition to a staggered, 2-year term.

How It Works

In even numbered years (1998, 2000, etc.), the President, Membership Chair, Program Chair, and Newsletter Chair will be elected. We will be voting on these positions this coming November. In odd numbered years (1999, 2001, etc.), we will elect the Vice President, Secretary/Treasurer, Meeting Chair, Government Liaison, and Web Master. Each outgoing board member trains his replacement.

Smooth Transition and Continuity

Having the outgoing member train the incoming member and electing half of the positions each year provides continuity from one board to the next and shortens the learning curve of new board members by having an experienced board member available with immediate answers. Newly elected board members will take over established programs and begin planning future programs rather than spending their first couple of months "just getting up to speed." The overlap also enables future boards to

define programs of varying duration without the urgency to complete all programs within a given term of office. Half of the board will always be in place to ensure follow through on all active programs.

Special Election in May 1998

We will hold elections in May of this year to elect odd-year officers and chairs. This will mean that these officers will hold office from July 1998 through November 1999 (less than two years). From November 1999 forward, all terms will be 2 years.

Broadening the Nominating Committee

The board believes that fresh ideas and new faces will help keep NCA a vibrant chapter that serves its members by providing the programs and services the membership desires. All APMP members in good standing are eligible to run for NCA board positions. To ensure the greatest participation as NCA officers and chairs, the board defined a nominating committee consisting of three members of the Board of Directors and three NCA members at large. The Vice President will chair the nominating committee. ■

Contact Nancy Nix-Karnakis at nnix@feddata.com if you are interested in serving on the nominating committee or serving as an officer or chair.

I Have Seen the Future

Adapted from e-mail humor
submitted by Linda Mitchell

Prognostication

Mother Shipton of Knaresborough (in England) made some prophecies in the early fifteenth century:

CARRIAGES WITHOUT HORSES SHALL GO
AND ACCIDENTS FILL THE WORLD WITH WOE
AROUND THE EARTH THOUGHTS SHALL FLY
IN THE TWINKLING OF AN EYE
THROUGH HILLS MAN SHALL RIDE
AND NO HORSE BE AT HIS SIDE
UNDER WATER MEN SHALL WALK
SHALL RIDE, SHALL SLEEP, SHALL TALK
IN THE AIR MEN SHALL BE SEEN
IN WHITE, IN BLACK, IN GREEN
IRON IN WATER SHALL FLOAT
AS EASILY AS A WOODEN BOAT
GOLD SHALL BE FOUND AND SHOWN
IN A LAND THAT'S NOT NOW KNOWN
AND, THE WORLD TO AN END SHALL COME
IN EIGHTEEN HUNDRED AND EIGHTY-ONE

Market Forecasting

Here are some more recent predictions:

- 1873: "The abdomen, the chest, and the brain will forever be shut from the intrusion of the wise and humane surgeon." —Sir John Eric Ericksen, British Surgeon-Extraordinary to Queen Victoria.
- 1876: "This 'telephone' has too many shortcomings to be seriously considered as a means of communication. The device is inherently of no value to us." —Western Union internal memo.
- 1895: "Heavier-than-air flying machines are impossible." —Lord Kelvin, president, Royal Society.
- 1899: "Everything that can be invented has been invented." —Charles H. Duell, Commissioner, U.S. Office of Patents.
- 1905: "Airplanes are interesting toys but of no military value." —Marechal Ferdinand Foch, Professor of Strategy, Ecole Superieure de Guerre.
- 1920: "The wireless music box has no imaginable commercial value. Who would pay for a message sent to nobody in particular?" —David Sarnoff's associates in response to his urgings for investment in the radio.
- 1927: "Who the hell wants to hear actors talk?" —H.M. Warner, Warner Brothers, 1927.
- 1929: "Stocks have reached what looks like a permanently high plateau." —Irving Fisher, Professor of Economics, Yale University.
- 1943: "I think there is a world market for maybe five computers." —Thomas Watson, chairman of IBM.
- 1949: "Computers in the future may weigh no more than 1.5 tons." —Popular Mechanics, forecasting the relentless march of science.
- 1957: "I have traveled the length and breadth of this country and talked with the best people, and I can assure you that data processing is a fad that won't last out the year." —The editor in charge of business books for Prentice Hall.
- 1962: "We don't like their sound, and guitar music is on the way out." —Decca Recording Co. rejecting the Beatles.
- 1968: "But what is it good for?" —Engineer at the Advanced Computing Systems Division of IBM, commenting on the microchip.
- 1977: "There is no reason anyone would want a computer in their home." —Ken Olson, president, chairman and founder of Digital Equipment Corp.

ACRONYM

ALPHABETICALLY CODED REMINDER OF NAMES YOU MISREMEMBER

Problems with Acronyms?

Now you can look up more than 48,000 acronyms and their meanings in a database that contains common acronyms about computers, technology, telecommunications, and the military, with an emphasis on Department of Defense (DoD), Air Force, Army, Navy, Marine Corps, National Guard, and Coast Guard acronyms.

Acronym Finder

Acronym Finder (<http://www.mtnds.com>) is not a glossary of terms, web search engine, dictionary, or a thesaurus—it is only designed to search for and expand acronyms and abbreviations. But Mountain Data Systems recommends computing glossaries like PC Webopeadia, Whatis.com and the Free On-Line Dictionary of Computing (FOLDOC).

To Find an Acronym

All you do is type in the acronym to search for (without periods or quotes) and press Enter or Find. Or, you can search for a word or concept by typing it in and clicking a handy checkbox. This finds all acronyms with the text string in the acronym's meaning. It provides complete "How To" information on how to conduct advanced searches.

The Web site provides a helpful section on Search Tips for advanced search techniques, including use of wildcards. If you don't find an acronym in the database, but know its meaning, you can enter it on the Web page and Mountain Data Systems will conduct a special search.

Jo Manson queried the site and found that "APMP" was not in the database. She submitted the acronym for consideration and you can now find "APMP"

Be sure to look up the word ACRONYM. The finder even finds "nested" acronyms which is an acronym within an acronym. It displays one acronym that contains up to three levels of nested acronyms.

Mountain Data Systems is an electronic publishing company that provides Web page consulting, graphics, scanning services, desktop and print publishing, computer and software and consulting services.

Be sure to visit their site at <http://www.mtnds.com> ■

APMP Membership Application

Our annual membership is \$75. Please complete the application form and submit it with a check made payable to APMP:

PO Box 1172 • Idyllwild, CA 92549-1172. *Credit cards are accepted.*

FIRST NAME INITIAL LAST NAME

POSITION TITLE COMPANY

BUSINESS ADDRESS MAIL CODE/MAIL STOP

CITY STATE ZIP CODE

HOME ADDRESS MAIL CODE/MAIL STOP

CITY STATE ZIP CODE

REFERRED BY
TYPE OF MEMBERSHIP NEW RENEWAL
PREFERRED MAILING ADDRESS BUSINESS HOME
Do you wish to affiliate with the local chapter (NCA)? Yes No
Payment: Check VISA MasterCard Amex

Card Number Expiration Date Signature

PRIMARY FUNCTION-CHECK ONE ORGANIZATION'S SERVICE/PRODUCT-CHECK ONE

- | | |
|-----------------------------------------------|------------------------------------------------|
| <input type="checkbox"/> Business Development | <input type="checkbox"/> Aerospace/Defense |
| <input type="checkbox"/> Program Manager | <input type="checkbox"/> AE/Construction |
| <input type="checkbox"/> Proposal Consultant | <input type="checkbox"/> Aircraft (Commercial) |
| <input type="checkbox"/> Proposal Manager | <input type="checkbox"/> Electronics |
| <input type="checkbox"/> Proposal Specialist | <input type="checkbox"/> Engineering Services |
| <input type="checkbox"/> Strategic Planning | <input type="checkbox"/> General Services |
| <input type="checkbox"/> Other (specify) | <input type="checkbox"/> Health Services |

EMPLOYER-CHECK ONE

- | | |
|-------------------------------------------------------|--------------------------------------------------|
| <input type="checkbox"/> Information Systems Services | <input type="checkbox"/> Precision Instruments |
| <input type="checkbox"/> Academic/Education | <input type="checkbox"/> Systems Integration |
| <input type="checkbox"/> Government-DoD | <input type="checkbox"/> Transportation Services |
| <input type="checkbox"/> Government-Non-DoD | <input type="checkbox"/> Non-Profit |
| <input type="checkbox"/> Non-Profit | <input type="checkbox"/> Other (specify) |

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Soft Survey

Complete

IT'S OUR 5TH ANNIVERSARY AND WE CONDUCTED AN INFORMAL "SOFT SURVEY" BY e-mail and asked a wide range of questions to our members. While this was not a formal statistically significant survey, the results were interesting.

What was the best thing you ever learned at an APMP meeting?

Kiersten Dick of Advantage Staffing said at local chapter meetings the best thing she learned at a local NCA meeting was Oral Presentation Do's & Don'ts. At the APMP National Conference, she felt the best was a presentation on a virtual proposal center and how to write effective theme sentences. Loriann Bobotek, also with Advantage Staffing, has been a member about six months and says she discovered that her company "has far more to offer our clients than just 'associate talent' during periods of crisis. This came mostly from dinner table discussions..."

Dennis Green, long time member of the APMP and one of the founders of the NCA, says "At my age, it's hard to point to any one 'best thing' I have learned. Many things have brought me to APMP meetings and many more keep bringing me back. They include: our membership and the stimulation of so many passionate, accomplished, and get-the-job-done people; my ongoing interest in written persuasion techniques; a need to stay in touch with what's happening in the industry; and finally, the professional integrity, as inspired by our group."

Lois Pfeiffer of NCI says the best thing she's found in APMP is an association of professionals who really understand what she does for a living.

Marianne Gouveia says: "Our members are some of the finest people in the industry. I have learned a tremendous amount of new information and have been able to tap into expert resources for opinions on complicated corporate issues. The most valuable information I have received is the industry trends and best practices discussed at our national conference. I also find the discus-

sions and topics on new proposal technologies and software extremely valuable, especially as it relates to Electronic Procurement."

Nancy Nix said that Dr. Steve Kellman's discussion of the Federal Government and proposals was the best thing she had ever seen.

Pat Baird of PME says that the war stories she hears and lessons-learned helps her company learn more about the challenges and problems proposal people face. She says, "...it helps us come up with better automated solutions for the pro-

posal process." Pat smiles and admits "...we do have to admit that some of the situations we hear about defy help."

Russell Smith of OCI says that he believes the 3-person panel discussion chaired by J.P. Richard was the best thing he's seen at APMP. It presented lessons on the management and

conduct of oral presentations and how to prepare for them.

Who introduced you to APMP? How did you first hear about the organization?

Rhonda Wright of CSC introduced Kiersten Dick to APMP, but she first heard of it through Eric Gregory (of CACI at the time). Lorianne Bobotek said she heard about the organization from someone in her region at Advantage. She became more interested after speaking with Tom Keller at Northrop Grumman. Lois Pfeiffer was introduced to APMP by Nancy Nix. And, thanks to Karol Burt, Nancy Nix joined APMP.

Howard Nutt, one of the original APMP charter members, introduced Marianne Gouveia to APMP. She says, "He convinced me that my participation would not only be fun, but would be professionally enriching as well. He was right!"

Both Frank Lincavage and Bud Drutz told PME

about APMP at about the same time. PME says "We figured that if it was being talked about on both coasts, we should check it out."

The Best War Stories and Jokes?

Twenty-seven people responded to the double question "Who tells the best war stories? ... The best jokes?" There was no single individual named as "the best" in either category. Here are a few of the responses:

Kiersten Dick says that Jerry Langston (PRC) has the best war stories and Russ Allison (AMS) is the best jokester. Lois Pfeiffer says that Nancy Nix has the best stories, and Loriann Bobotek says it's Dian Marincola from RMS Information Systems—"hands down."

Marianne Gouveia believes that Tom Boren is a real captain of industry: "I haven't heard anyone yet match his stories." For jokes Marianne touts David Bol from US West. She swears that "...you can't even have a conversation with this guy without first hearing some of the best jokes in the nation. He gets my vote! Both he and Tom ought to have their own columns in the Perspective."

Pat Baird of PME says the best war stories are usually from the proposal managers. They are the ones who are often stuck between management, marketing, and the proposal team. As far as the jokes are concerned, she says that the consultants usually have the best jokes, "probably because they get around to so many sites."

Russell Smith of OCI says that the best proposal stories come from Ben Hord of Imprimis and the best jokes from John Lauderdale.

Thoughtful Comment

We'll close with a thoughtful comment about war stories and jokes from R. Dennis Green:

"Everyone's stories and jokes are worthwhile, especially when told in the context of competitive proposals. If your goal is to win these competitions, you'll rank as "Good" the stories you live through first hand and survive to tell as victors. But the "best" war stories will be those you hear which inform you about a competitor's approach. If seeking entertainment, you'll enjoy them all." ■

How Many Business Cards?

The question asked for a range of the number of business cards individuals typically hand out at a meeting. Of 32 respondents to this question, 23 said they handed out two to five business cards each meeting. One special answer came from Marianne Gouveia who said "More than I carry,"

Developing Effective Proposal Graphics

Making Your Pictures Worth a Thousand Words

BY DAVE HERNDON

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A picture's message crosses time and language; man's first recorded written communications were pictures drawn on cave walls. Today, it is still easy to understand that a stone age drawing showing a man with a spear and a deer means "hunting for food." The evolution of written language over several hundred thousand years has not diminished the importance of communicating through pictures: It still takes significantly less effort to understand a picture than it does to interpret letters and words. But in today's complex world, there is another reason to use pictures for communication: a picture can illustrate both overviews and details. *A message provided through an accurate picture can describe many things that are difficult to describe in words. A pictorial message is also less prone to misinterpretation by a reader.*

In proposals, communication of details is made especially difficult by the severe page restrictions we often encounter. Every writer is familiar with the statement, "A picture is worth a thousand words." In addition to improving the overall presentation, the use of graphics is a primary tool in reducing pages. Strong proposals always contain significant graphics. While there is no magic percentage, winning proposals often have 30-60% total page space in graphics.

The two primary proposal-writing approaches, text-based and graphics-based, both depend on graphics to tell stories effectively and persuasively. During storyboarding, graphics-based writers first develop

a graphics series to tell the story and then link and supplement or complement these graphics with narrative discussions. Text-based writers begin storyboarding with details in bullet format (words) and then add graphics. In either case if the graphics are not right, the proposal will not be effective.

What makes a graphic "right?" An effective graphic must:

1. be **readable**
2. be **understandable**
3. **make a needed statement**

Let's look at these three criteria one at a time.

Getting Noticed (and Read!)

Four elements affect the probability that a graphic will grab the reader's attention and be read:

- **In-text introduction:** For people who read first (as opposed to people who look at the pictures first) the in-text introduction is the first place to influence a graphic's readability. A strong in-text introduction—one that states a needed benefit—can make looking at the graphic almost irresistible.
- **Page position:** A key guideline in locating a graphic in a proposal is that a reader will be more likely to look at a your graphic if he can do so without any extra effort. Specifically, try not to make a reader turn a page sideways (from portrait to landscape or vice versa) to read your graphic or hunt for it someplace else in your proposal. There is also another, less obvious guideline to guide you in locating proposal graphics: Brain research experts believe that putting pictures on the left side of a page and text or numbers on the right "wakes up" both sides of the brain and gets the message across more quickly. (Windows Magazine, Jan 96).

- **Appearance/Complexity:** For people who look at the pictures first to determine if they want to read the text, a graphic's appearance is what makes them decide to examine any particular piece. Readers who decide to examine your graphic can be turned off by its appearance and complexity. For example, a simple drawing almost always draws attention (and is easier to understand!) whereas a complex, detailed illustration such as a long, multi-column, fine print table or a highly detailed multi-page diagram will usually make the reader skip the graphic.

- **Use of color:** For all types of readers, the use of color can do four things: attract, emphasize, clarify, or simply decorate. Make sure you know why you are using color and don't use it for the wrong purpose: decoration has little value in a proposal. A color graphic will be noticed and read before a similar one in black and white. In addition, the proper use of color in a very complex diagram can make it easier to follow and understand. In fact, some experts say that color can speed up a viewer's perception of trends by up to four times over black and white. (Windows Magazine, Jan 96)

All this emphasis on being noticed and readability is important, but there is one especially important admonition about readability in graphics: "making it readable" does not mean "having to read it." Not only should you not use a graphic to get around page constraints (putting a box around several paragraphs of tiny type does not make it a "graphic"!), but extensive explanatory text within graphic actually makes it harder to understand quickly and less likely to be "read." The more

seeing and the less reading, the better. Where possible, use symbols rather than text notations. Design and redesign a graphic until the picture speaks for itself. Make sure your message is worth saying and is clear.

Ensuring Clarity and Understanding

- An otherwise attractive graphic that does not communicate a clear message is totally useless. In fact, it is worse than useless since it takes up valuable proposal real estate. For a graphic to be understood, it has to meet several criteria:
- The graphic's message must be understood in a very short time or the reader will simply skip it.
- The graphic's message must be clear without having to read the title or action caption.
- Perhaps most importantly, the graphic's general message must be clear to the non-technical reader.
- Graphics found in unsuccessful proposals seldom meet these requirements.
- The non-technical reader serves as a good benchmark for assessing graphics clarity. Almost all proposal evaluation boards contain key members who are not technically current. The proposal must "sell" to these non-technical evaluators to be considered for award, and a graphic that is clear to you may be gibberish to a non-technical reader.
- The way to begin making graphics easily understandable is to make them simple and logical. For example, to simplify things, a highly complex and detailed graphic can be broken down into several less complex graphics. Another successful approach to simplifying graphics is to present a summary graphic (block diagram, etc.) immediately before or within a highly detailed one.

- Simple graphics can be smaller, too, which will also help you position the graphic. It is easier to place a smaller graphic on the same page as its introduction and keep it in the same orientation as its introductory text.¹
- Logic is the other key factor in ensuring that a graphic is understandable. A graphic that is logical in its approach is just plain easier to understand than one that is not.² For example, a flow chart without a clear beginning and end loses the reader. (For flow charts, numbering the steps goes a long way to helping readers follow the process.) The specific graphic type used is also important in ensuring the most effective message. For example, a table illustrating comparative numbers is certainly superior to just discussing these numbers in text. However when providing number set comparisons that bring a benefit to the customer, a bar chart representing these numbers better illustrates number differences.
- Finally (at least with respect to clarity), while a good graphic must be able to stand alone, a strong title and/or action caption will ensure that the purpose of the graphic is clear to everyone. Don't be shy when it comes to making your point!

Making a Needed Statement

- Oscar Wilde said, "Bad art is a great deal worse than no art at all." Nowhere is this more true than in proposals. Graphics for graphics sake alone simply take up space...space that is quite valuable in severely page-limited proposals. There must be a reason for a graphic. The graphic

¹ If you are tempted to argue that it's too hard to create small graphics that mean anything, keep in mind an observation by Ernest Hemingway: "All the guys who can paint great big pictures can paint great small pictures."

² In fact, all graphics need a place to start...some clue to the reader to know where to look first.

<h1>Proposal Graphics Test</h1>	
(1) The graphic grabs the reader's attention in less than 10 seconds	
(2) The overall message of the graphic is understood in less than 30 seconds	
(3) The graphic message is clear without reading the title or action caption	
(4) The general graphic message is clear to a non-technical reviewer	
(5) The graphic presentation is logical. For example a flow chart has clear beginning and end points	
(6) The graphic type and layout is the best way to state and sell the intended message	
(7) The message conveyed by the graphic is one the evaluator wants to see or needs to know	
(8) The graphic complements/supplements the text with minimal redundancy and enhances the story	
(9) The action caption matches the graphic and summarizes the graphic and provides a benefit	
(10) The graphic responds to RFP requirements or sells themes/features and resulting benefits	
TOTAL	
<p>GRAPHICS SCORING: 0-3 Not Usable, Toss and Start Over; 4-5 Not Usable, Major Revisions Required; 6-7 Marginally Usable, Upgrade if Possible; 8-9 Usable; 10 Highly Usable</p>	

must convey a needed message.

- Two of the criteria for judging good proposal text can be used to decide if your proposed graphic message is needed: Does the graphic tell something that is either important to the customer or unique to you? That is, is the graphic message one that the proposal evaluator either wants or needs to know. For example, to judge importance to the customer (wants to know), see if your message responds to some specific RFP requirement—Section M is a good place to start. For "needs to know," check to see if your graphic illustrates a theme or provides feature(s) and resulting benefit(s) of your approach. Another criteria for "needs to know" is whether your graphic supplements (provides additional supporting information) or complements (rein-

forces) the text message. But with either of these, be careful that the graphic is not redundant to the text. If it is, remove one or the other—preferably the text! (Remember the "picture is worth a thousand words" equation and save the space!)

A Proposal Graphics Checklist

- Good graphics should be a major concern to all proposal managers. While art, like beauty, is in the eye of the beholder, there are some simple guidelines for judging if your artwork will help strengthen or weaken your proposal. The checklist above can be used to: (1) aid writers in preparing graphics; (2) assist proposal/volume/section managers in evaluating graphics prepared by their teams; and (3) rate proposal graphics effectiveness during Red Team

reviews. Assess each graphic against the following ten test criteria using the numerical scoring system described below the table. The higher the score, the more likely your graphic will help your proposal, not hinder it. ■

Dave Herndon has more than 27 years experience in proposal preparation and has served on more than 85 proposal teams (44 as Proposal Manager). Besides being an independent proposal consultant, Dave is an associate of Engineered Proposals.

Engineered Proposals, based in Waitsfield, Vermont, is an association of experienced proposal professionals who offer a full range of proposal development and proposal management services. They offer copies of their newsletter to interested proposal professionals at no charge. Contact Carol A. Dean at 802-496-6469 or by e-mail at CarolADean@aol.com

Recognize Performance With a Thank You

BY RICH FREEMAN

Proposals can be the environments to test anyone's mettle. If the environment is tough, the high stress can cause some to falter and some to excel. If someone on a proposal team excels, there are lots of ways to let them know they've done well. But, if you want to excel in your way of sending a Thank You try these tips:

1. **The Form**—Always put it in writing
2. **The Delivery**—Make it public, make it personal
3. **The Deed**—Tell exactly what happened
4. **The Importance**—Tell exactly why it was important

The Form

A tough proposal editor once told me "If it ain't written, it ain't said." There is nothing as good as getting a written acknowledgment of your good deeds. The range of written thanks go from a formal letter of commendation, to a warm personal thank you let-

ter, or Thank You card with a scribbled note. Select the appropriate level according to the size of the deed. If the deed is small then the commendation letter is probably not the way to go. Does e-mail count? Well, maybe, if you do it with pizzazz, e.g., send e-mail copies to all co-workers, supervisors, and team members, as well. There are also e-mail Thank You cards you can buy and send. Some of them are pretty cute and very thoughtful. But an e-mail probably still ranks below the Thank You card. Use two types of Thank You cards. One type can be more expensive and formal looking.

The Delivery

You have three choices of the way you deliver a thank you: Publicly, privately, and both publicly and privately. If it's a small deed, privately is best. If the deed is larger, publicly is appropriate. If the deed is of heroic proportions, first do the thanking privately, then do it publicly. Do this only if you are certain the person will be comfortable in this forum. Many people are not comfortable in public, so it is better to check first.

Like the form, each level of the delivery has subtle layers of appropriateness. The protocols for delivery can even be informally discussed so everyone knows how to distinguish the importance of the Thank You. Make it as complicated as you like, I prefer simplicity; a quiet thought about the appropriateness of my thank you and then an impulsive quick choice. Don't procrastinate—execute the plan the moment the thought occurs to you that someone deserves a Thank You.

The Deed

Write a short description of the deed. Pick your modifiers carefully. Have your word tools at hand: dictionary and thesaurus. Have some boilerplate ready. Avoid "single-handedly." Stick to the basic facts: "Worked more than 80 hours per week during the proposal period;" "Smiled constantly and had pleasant things to say;" or, "Had the fewest instances of passive voice of any writer."

There are many media for delivering a Thank You. There are clowns, balloons, singing telegrams, and even a formal pomp and circumstance regalia to choose from. You can invite the world to the event or keep it small, just between the two of you. You can tell everyone in the nation's capital or you can tell a few peers, friends, and family.

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The Importance

Tell exactly why the deed was important:

Working long hours without compensation is a special contribution of time and effort to the business development of this company. Proposals are costly efforts. Your contribution directly affects our bottom line. I want you to know...

When several of our proposal team called in sick, you came in to help us publish...

You did an excellent job of writing the...

Psssst! A Proposal Secret

Here's a proposal secret—collect a complete set of specific proposal performance metrics. Don't make it a chore, and don't make it a big deal. But do make it a regular habit. For example, a passive voice check and other metrics are possible—quickly and easily—through your local grammar checker. Award your best writer's with the "No Passive Voice Award" using the metrics from the grammar checker as the judging factor. Send your Thank You with an actual comparative count, so the person being thanked can quantify how well they really did.

A Thank You Reinforces Behavior

Finally, we want to make proposals a positive experience and rewarding our staff and others is one way to build strong teams and create a positive environment/work place. Rewards are a Thank You for today's efforts as well as an investment in tomorrow's performance. They reinforce the behavior we would like to see repeated over and over again. ■

Proposal Center Wellness Survey

Century Planning Associates is conducting a proposal center wellness survey as part of their presentation at the APMP annual conference in Colorado at the end of April. Proposals tend to be highly stressful, and this survey is a chance for you to participate in an important information gathering effort. To be a participant in the survey and receive a copy of the survey results, contact Joe Nocerino at 703-790-0140 or by e-mail at DrBlinky@aol.com ■



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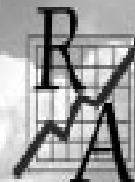
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