The Executive Summary

VOL V NO. 2 AUGUST/SEPTEMBER 1999 A BIMONTHLY PUBLICATION OF THE APMP NATIONAL CAPITAL AREA (NCA) CHAPTER

How to Purchase Proposal Software

By Carl Dickson

Introduction

SEVERAL DIFFERENT TYPES of software are relevant to developing proposals. Some of it is generic COTS, some of it specialized for proposals, and you can always have something custom developed. Deciding which approach to take is not easy, and is made more difficult by there being more than one type of proposal. What works for one company, may be totally wrong for you. There is no "one-size fits all" proposal software solution.

The 80/20 rule applies to proposal software. You can get 80 percent of the functionality you need for 20 percent of the cost. If you want that last 20 percent of functionality to make a total solution, it's going to drive the price up 80 percent. This rule applies so well to proposal software, that you may want to think of it as the 90/10 rule.

The most important thing to remember in looking for proposal software is that your proposals are different from everybody else's. First, there are different types of proposals, for example, Federal RFP based, commercial, product, service, etc. Second, there are different types of companies—different sizes, some centralized, some decentralized, some with sales people, some with proposal groups, etc. Then there are different types of internal resources and infrastructures—LANs, WANs, software suites, proposal libraries (online and off), operating systems, platforms, etc. When you get down to the level where you are comparing processes and cultures, it's pretty clear that even companies within the same general categories and sharing a number of similarities will also have some key differences in how they do proposals.

Finding the approach that best fits you will not be easy. You may have to break down your needs for proposal automation into components. You may face trade-offs. And all through this will run the 80/20 rule. You can do some things quite easily. Other things will be more difficult, and therefor more costly. If you can get by with an 80 percent solution, you can probably do it quite cost effectively. But if you have to have a 100 percent solution, you're going to see the cost skyrocket. That's nobody's fault—it's the nature of the 80/20 rule. If you have to blame somebody, blame Murphy, because the 80/20 rule is a corollary of Murphy's Law.

Life cycle considerations

DO YOU WANT fully integrated or separate tools?

A key question you will need to address early will be whether to pursue a single "all-in-one" approach, or to build a tool kit. Either approach has significant difficulties to overcome. Before you can make an informed decision regarding which way to go, you must be comfortable in your awareness of the proposal software infrastructure components you require and in how the type of proposals you will be doing will affect the suitability of any candidates.

An "all-in-one" approach is not possible for most proposal environments. If your proposals are consistent, both in process and output, a fully integrated approach may be possible. If you must be adaptable, either in process or output, a fully integrated approach may still be possible, but less likely. Note that an integrated off-the-shelf solution puts all of your eggs into one basket. Since no plan ever survives the first sight of the enemy, make sure you test the proposed solution in a real world environment before committing. If you can't test it on a live proposal without committing to it, you're at risk.

A tool kit approach will be the approach taken by most, but requires attention to planning and technical details to make sure that the various parts of the solution work together. One thing that can help the tool kit approach is to establish a technology platform and integration standards.

Continued on page 4

IN THIS ISSUE

APMP National Capital Area (NCA) Chapter
P.O. Box 2066
Arlington, VA 22202-2066
Web site:
http://www.apmp.org/nca/

NCA Board Members—1999
Carl Dickson
President & NCA Webmaster
cdickson@optym.com
703-883-9112

Bob Crawford
Vice President
rcrawford@orgcom.com
703-478-0850

Laura Griffith
Membership Chair/
Membership Chair Elect
lhgriffith@aol.com

Lou Robinson
Secretary/Treasurer
lou_robinson@prodigy.com
703-533-2102

Dottie Lennox
New Member Liaison Chair
Dlennox@orgcom.com
703-689-9600

Glenda Schroeder
Meeting Chair
gschroeder@advstaff.com
703-931-9600

Eliana Hassen
Program Chair
ehassen@aquent.com
202-293-4987

Newsletter Team
Kate Rosengreen
Kmrosen@aol.com
703-205-1210

Jeff Burkett
Advertising
Jburk504@aol.com
Work: 301-210-3600

Ralph Scherer
Freelance Graphic Design
ralph@schererMedia.com
703-753-0880

President's Corner by Carl Dickson

One of the most difficult aspects to running NCA is maintaining a current mailing list. Sounds like it shouldn't be that hard, right? Well we've got membership data kept at the National level and we've got addresses of members and interested non-members kept at the local level. We've got people whose memberships have expired and may not realize it. We've got people who have changed jobs and have not updated their info. And if they have, it may have been updated in one list and not the other.

The reason I mention this is that we're finally getting it all under control. With the NCA web page, users can update their information. All of the mailing list information we have from all sources has been integrated into the web site, so we now have one place to send emails from and get them to all users.

The only problem with this is that about 20% of you have bad email addresses in the database. You probably don't even realize it. If you're not getting the emails announcing the roundtables, you may be one of them.

With the new web site, you can register and log in. You can also conveniently surf by without logging in. But when you register and log in, you will be prompted to fill out a contact form that will enable us to keep your contact information current. The registration system even has options that enable you to decide whether or not you want to receive email announcements and news from APMP.

I'd like to encourage everyone who has not already done so, to go to http://www.apmp.org/nca and make sure you log in. Reconciling the data we have is not easy, nor is keeping it up to date. The system is still not perfect, but we're working on it and making good progress.

By logging into the Web site, we will be able to ensure that you stay on our list, whether you are officially a member or not. And if you move, you will be able to update the information directly when you log back into the site and discover the information on you is old. I can't emphasize enough how important it is that you update your information if you move or change jobs. Logging into the Web site on a regular basis will also enable you to keep in touch.

The new site enables people to help us contribute content, post announcements, and add other information. If you would like to help us add to the NCA Web site, let me know and we can give you write access so that when you log into the site you can add whatever is needed.

We plan to post all roundtable announcements, board meeting announcements, and other NCA related information this way. Roundtable announcements will also go out via email to those on the national list or who have logged into the site. The newsletter will continue to go out via postal mail to help ensure that we stay in touch with all users. We are also going to set up special interest groups on the Web site, so if there is a topic of particular interest that you would like to discuss with other members, let me know and we can set up an area for it. ■

Murphy's Laws for Proposal Development

1. A schedule isn't. And even if it was, it's already obsolete.
2. **The RFP is not optional.**
3. The quality of a proposal will be in inverse proportion to the number of people who work on it.
4. **Change cycles will expand to fill a longer schedule.**
5. The last change cycle is always rushed at the expense of quality.
6. **If your equipment works flawlessly, your staff will take unexpected leave. And vice versa.**
7. No database will ever contain the information you need and if it does it will be out of date.
8. **All resumes are incomplete.**
9. The cost per page of a fixed page proposal and a unlimited length proposal will be the same.
10. **You will produce more paper responding to an oral proposal than a paper-based submission.**

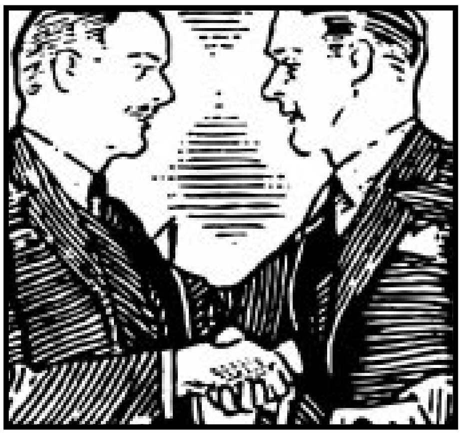
September NCA Roundtable NASA/ODIN Project

At our next NCA Roundtable Karen Smith, Contracting Officer for NASA/GODDARD will be the speaker.

Karen, a contracting officer for the NASA/ODIN project has worked on several teams to evaluate proposals and score them against various RFPs. Her 11 years at NASA gives her the expertise we need to better understand the proposal review process from a seasoned Contracting officer's perspective.

The topic will be "Proposals, all there is to qualify from a Contracting Officer's Perspective." She will describe the different teams that are in place on the ODIN project. (Outsourcing Desktop Initiative for NASA).

Karen will present for 45 minutes allowing ample time for Questions and Answers. This promises to be an interesting and informative event and NCA members and guests are sure to enjoy. ■



TRW Roundtable Meeting

TRW was host for the Roundtable meeting on July 21. Tom Porter, the TRW Proposal Center Director, was in charge of the outstanding program that included four presentations and a facility tour. It began with a role-playing storyboard demonstration, followed by a tour that included a briefing showing the working environment and procedures of the TRW proposal teams, followed by a briefing on the importance of Past Performance and a briefing on the Impact of Mergers on the Proposal Process. It was like having four Roundtable meetings all in the same evening. This event was attended by 108 people, the most since TRW hosted a similar event several years ago. NCA thanks Tom Porter, Liz Skarlatos, Nancy Kessler and all of the others that contributed to this successful meeting. ■

Calendar of Events

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

				Contact Phone No.
AUG	2	NCA Board Meeting	• Topic: General Business	703-883-9112
SEPT	13	NCA Board Meeting	• Topic: General Business	703-883-9112
	15	NCA Roundtable	• Speaker: Karen Smith, NASA Odin Contracting Officer	202-293-4987
OCT	4	NCA Board Meeting	• Topic: General Business	703-883-9112
NOV	1	NCA Board Meeting	• Topic: General Business	703-883-9112
	17	NCA Roundtable	• Speaker: Denise Rhea-McKenzie, LITTON/PRC	202-293-4987

Purchase Proposal Software...

Continued from page 1

Choosing a platform is a key strategic decision that will ultimately decide the success or failure of the effort. Do you go with a groupware, document management, workflow, database, web server, or some kind of hybrid approach? None of these is a solution unto itself. All of them are a starting point.

For example, if you select a groupware platform and pick Lotus Notes (or MS-Exchange), you do not have a solution. Out of the box, Lotus Notes (or MS-Exchange) does little beside messaging. You'll have to design your components, select development tools, and then build what you want—at considerable expense. Advice: know what you're getting into.

Once you understand the implications of the platform you have selected, you can develop integration standards that will ensure tools can be added to solve specific problems and be compatible with the rest. Note that adding tools in a piece meal fashion is a long term undertaking. If you don't have personal, management, and budgetary commitment to a long term approach, you may not be able to achieve your goals. On the other hand, with a platform-based approach, you can modify your toolkit over time as your needs change—assuming that the platform you picked has the flexibility to do that.

Adaptability/Flexibility

SOME PROPOSAL SHOPS produce a high volume of fairly consistent proposals. Others produce fewer proposals and each one is custom built. Even if your proposals are consistent, ask yourself: "How often do you make exceptions to your standard development process?" and "How often do you add or change content?" You should also ask yourself if any other factors, such as changes in management or staffing, could affect the consistency of the approach before you build around it. You may find that "fairly consistent" means that change just happens at discreet intervals. Some proposal software infrastructures will be based on the assembly line concept, others will be based on providing a tool box. Which one is the better investment depends on what you're building. Before you make a proposal software selection, make sure you understand just how far it can adapt before it breaks.

What happens after installation?

MOST SOFTWARE REQUIRES configuration. The question to ask is whether the configuration can be done on your own, or if the vendor will have to do it for you (and at what cost?)? Even if the software is designed to make it possible for you to do it yourself, how much will be required and will you be able to absorb the level of effort? You should ask similar questions with regards to what to do about the legacy data contained in your past proposals.

How long to full operational status?

WILL PROGRAMMING BE required? How long will configuration take? When will legacy data be converted? Can the steps following installation be broken into phases to allow at least partial operation prior to completion? You want to be able to start benefiting from the purchase as soon as possible. It is also important for setting the expectations of users and management.

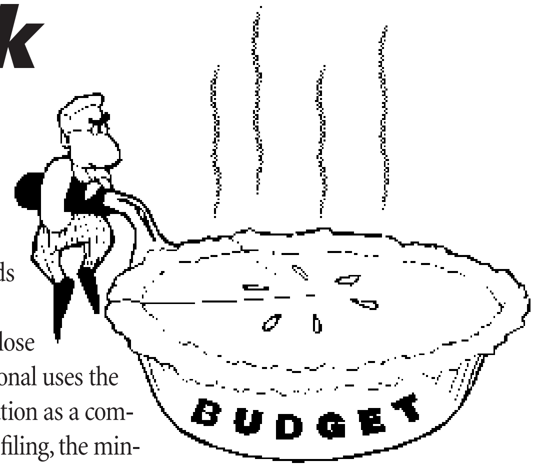
How will you maintain the data?

ANY SYSTEM WILL have planned inputs, outputs, and maintenance activities. If you build a resume system, how will you keep it up to date? Once a proposal is completed, what will the archival process look like? When changes are made to re-use material, how will they be integrated back into the central copy?

The level of effort required for some of these things can be considerable. If you are a small shop, consider outsourcing the maintenance so that you can focus on your primary mission. ■

The Treasurer's Nook

By Lou Robinson



How is APMP organized?

Have you ever wondered how APMP is organized? I had never thought much about it until I became an NCA board member. When I went to the first few board meetings, I discovered that APMP is one organization, with a National board and numerous chapters—NCA being one of the chapters. Each chapter is chartered by the National board ,after they meet the qualifying criteria. APMP is incorporated, has a Tax Identification Number (TIN) and reports to the IRS through the National organization. The APMP incorporation allows a tax free operation (except for sales tax).

The mission of the National APMP and the chapters is similar, but accomplished in very different ways. Both organizations are trying to provide a learning environment for proposal specialists. The chapters do it by local meetings such as our Roundtables, and the National organization does it through National Conferences such as the one recently held in San Diego, and the APMP Professional Journal. NCA is an arm of APMP that reaches out frequently to those proposal specialists in the Washington metropolitan area. National focuses on annual multi-day events that are designed to reach out to proposal people throughout the country and even the world.

The NCA submits financial information, minutes of board meetings and roundtable attendance records to the National APMP after the close of each year. National uses the financial information as a component of its IRS filing, the minutes to verify chapter activity and the attendance records to compute the dues rebate to the chapter. These are the only ways NCA reports to the National organization on an official basis.

When you join APMP, you automatically join at the National level. You may also choose to affiliate with a local chapter. NCA is unusual in that we have hundreds of proposal professionals within driving distance and hold regular meetings. APMP members in rural areas may be hundreds of miles from their "local" chapter.

We are fortunate to have Eric Gregory, the CEO of National APMP, in our area. This allows a great deal of unofficial liaison between NCA and National APMP. Carl Dickson, NCA President, meets with Eric on a monthly basis to discuss activities of NCA and National to determine ways that each can help the other. ■

Do you have an idea that you would like to see NCA implement?

NCA PROVIDES OPPORTUNITIES to its members to achieve the things they would like to see happen. Would you like to see NCA activities that address particular subjects such as proposal production, business development, commercial proposals, health care proposals, or others? If so, then why not start a Special Interest Group. We'll set up an area on the NCA Web site where you can start discussions and collection information on the topic. Using online forums to get a SIG going enables you to do it when time is available to you. And when you're ready, we can set up a preroundtables meeting or a lunch-time brown-bag for a face-to-face meeting.

Another program that is high on our priority list is to start a formal vendor program within NCA. Vendors can sponsor our activities and provide items for raffles, discounts to members, and other benefits—but only after we develop a set of written policies to be approved by the Board. We're looking for an author, preferably someone who is not a vendor or already on the board to serve as the primary author. It's a great opportunity for networking and building resource awareness, as well as a way to contribute to the delicate balance we keep between vendor and employee proposal professional participation.

If you are interested, either in special interest topics or in helping us craft our vendor program policies, please contact Carl Dickson, either by email (cdickson@optym.com) or by phone at 703-883-9112. ■

Special Interest Groups: A New NCA Initiative

By Gene Alfaro

There are many different types of proposals. The majority of people within NCA do proposals submitted to the Federal Government. However, we also have people who do other types of proposals. At each roundtable there are always people from one or more of these other proposal types.

NCA is starting several special interest groups to provide focused networking, discussion, and learning opportunities. These interest groups will target different types of proposals such as commercial, health care, grants, and finance proposals. They will also target different topics such as marketing and business development, writing, managing, and production. Over the next few months we'll be including a description of one of the new SIGs in each issue of our newsletter. The first of these special interest groups will target small businesses. Doing proposals for a small business can be significantly different from doing them for a large aerospace/defense company or other large firm. If you work for a small business, NCA's Small Business SIG will provide you with a way to interact with others who have similiar interests.

WHAT IS THE FOCUS OF THE SIG? TARGET AUDIENCE?

Small Business SIG is the Target Audience. We hope to attract more small businesses to the APMP membership in order to advance the arts, sciences, and technology of proposal management and promote the professionalism of those engaged in those pursuits.

WHY SHOULD THE SIG BE HANDLED SEPARATELY FROM THE MAIN BODY OF THE ASSOCIATION?

We do this by providing proposal science topics that directly concern small businesses in a session in addition to regular chapter meetings. Topics concerning Small Business proposal and opportunities are different from those at larger companies. For example: Small Business Innovative Research (SBIR) proposals have very specific proposal guidelines, but still many pitfalls. Small businesses have special proposal needs because they often are operating on very limited resources and still need to be able to take advantage of exclusive small business opportunities.

WHAT ARE THE LONG-TERM GOALS OF THE PROPOSED SIG?

The goal of an APMP sponsored Small Business Special Interest Group would be to raise the proposal process knowledge, skills and abilities of smaller companies. The importance of a well written and well presented proposal is just as important to small businesses as to any other size business. Because they are small, most do not have dedicated proposal management staffs or very limited staffs. Yet the opportunities for small businesses as far as special set aside programs, as team members, and as prime contractors are numerous.

HOW WILL YOU MEASURE THE SUCCESS OF THE SIG?

One measure will be taken at each SIG, captured in a critic request form. Another overall measure would be the number of small businesses which join the APMP because of the SIG's existence. We've yet to determine what the number would be to be considered successful and at what intervals would we take the metric.

WHAT RESOURCES WILL THE SIG REQUIRE?

We will need a place to meet and we're in discussions with the Northern Virginia Small Business to use their business development center. We want to be able to open the SIG attendance to non-APMP members and hopefully attract new members to the APMP. The SBA's help in this area is invaluable. Partnering with them will allow us to not only use their facility at a low cost but allow us access to their mailing lists for advertising the SIG events and APMP. This partnership can also serve to help us know what the expected turnout can be for our sessions and that allows us to plan for the cost of an event or session. The partnership also gives us an entre into a vast selection of topic speakers in a wide range of small business concerns. We want to plan to make the

SIG financially self-serving but will need seed money for initial mailing/advertising. As far as manpower, Gene Alfaro and Rose Noxon have volunteered to co-chair the SIG. We will need a treasurer and others to help set-up and make SIG sessions happen.

WHEN WILL THE SIG BEGIN MEETING AND WHERE WILL THE MEETINGS BE HELD?

We would like to begin meeting this fall Sept or Oct. We are partnering with the NoVa Small Business Administration and hope to hold sessions in their business development center at George Mason in Fairfax. We hope to meet every other month over the next year with a interim assessment of success after three session or six months.

WHAT TOPICS ARE GOING TO BE PRESENTED AT THE SIG?

The topics presented at Special Interest Group Sessions are focused on the unique needs of small business development through process, tools, and procedures to identify and pursue business opportunities through proposals. Members will be polled for future topics of interest. Topic for the first year may include:

- **Opportunity Pipelines**—Discussion and presentation focused on where a small business find opportunities to bid on, how a small business could establish an opportunity pipeline process, and what the benefits are to having a filter on the types of opportunities.
- **Bid and Proposal Resources of the Small Business Administration**—Discussion and presentation of the resources and services the SBA can offer in the area of lead identification and proposal preparation.
- **Small Business Innovative Research (SBIR)/Small Business Technology Transfer (STTR) Programs**—Discussion and presentation about these special programs targeted at small business growth. The two programs will be explained and SBIR proposal preparation will be discussed in detail.

- **Temporary Resources**—Small companies rarely have the ability to keep a proposal or proposal production shops staffed. This topic explores what types of temporary services are available, how to evaluate what you need and for how long, what to ask/tell a temporary service.
- **Teaming**—This topic discusses how a small company can find other companies they can team with to pursue an opportunity together. Discussion includes an introduction to the SBA mentor program, aspects to think about in formal teaming arrangements, and general information about registries and networking opportunities. ■

APMP 99

APMP National Capital Area Chapter
P.O. Box 2066 • Arlington, VA 22202-2066

Bulk Rate
U.S. Postage
PAID
Permit No. 180
Dulles, VA

Moved?
New Job?
???@e-mail?

LET US KNOW!

Contact Carl Dickson
703-883-9112
cdickson@optym.com

so you can continue to receive the latest NCA information.