

The Executive Summary

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Designing the Proposal

Introduction

By Rich Freeman

Sometimes it is helpful to re-examine what we do to create proposals. Sometimes it is helpful to review how we look at our work. When people talk about “producing” a proposal, it used to mean “writing” or “working on” a proposal. Let’s talk about “designing” a proposal and mean it the way we mean “designing” a new

automobile, where not only do we create a conceptual product, we even design the tools to make the product.

The Objective— Process Improvement

Look at proposal management as a leadership activity focused on managing the creation of an original and unique entity—the proposal. The proposal effort is both the process and the event that produces a unique outcome. Because every proposal is a unique entity, the process that produces each proposal is also unique.

We create better proposals by using process improvement in all three critical areas of the proposal process: capture management, proposal development and proposal production. We create winning proposals by properly designing both the product and the process that produces that product.

Introducing the Proposal Designer

The proposal designer directs the focus and performance of the pro-



posal team, acquires and manages resources, and sets the standards of quality for the final product. The designer is part design engineer, part leader, and part manager. The distinctions between these three categories are important in understanding how to produce winning proposals.

PART ONE—THE DESIGN ENGINEER

The design engineer part of the proposal designer works as a creative planner with other members of the team. This requires someone who is

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President's Corner by Carl Dickson

Electronic Government—What does it mean for the proposal profession?

The latest technology trend is toward electronic government. It's a lot easier and cheaper to process forms and orders online than it is through brick and mortar offices. Agencies at all levels want to provide service to the citizen online. President Clinton has announced a massive new government portal to give it all a single entry point. Everything that can be is being moved online.

Procurement offices are among the early adopters. Electronic procurement is being expedited by changes in the procurement process. The trend over the last few years has been toward large scale BOAs instead of traditional solicitations. GSA is now providing services via its schedule. BOAs and schedules are well suited to online implementation. Phased procurements, already a trend, become interactive procurements when they go online. The movement by GSA to add services to the schedule is the first major step toward paperless service solicitations. Throw in purchase cards for easy online payments and suddenly everyone wants to get into the act (and will have their site up Any Day Now).

New electronic government sites are being announced each week. Some are government sponsored, some are private initiatives that provide the electronic capability for a cut of the service fees (with no development costs for the government). Electronic malls, (some government sponsored, some contract specific, and some operated by suppliers) are doing more and more business. The need for many solicitations in the information technology sector has been eliminated by the use of electronic malls to handle equipment and networking buys.

The use of electronic storefronts for government purchases also brings "B2B" and supply chain integration within easy reach. The aerospace industry recently announced a major collaboration effort to put in place a B2B por-

tal where suppliers can exchange orders, manage inventory, and process transactions electronically. Projects with multiple participants can leverage similar techniques to provide fully integrated and streamlined back-end processing of orders received through a simple, customer accessible front end.

New business models made possible by web technologies may also catch on in the public sector. One example is reverse auctioning, where buyers set the price rather than suppliers. Priceline.com has made "naming your own price" famous. Instead of issuing an RFP, imagine the government saying what they're willing to pay and letting the vendor propose what they can do for that price. Purchase aggregation sites let you form buying groups that enable individuals to obtain quantity discounts based on the total quantity purchased by the group. GSA is experimenting with the technique. GSA is also doing it in reverse—for the sale of government assets. Some of these new models weren't feasible when the FAR was written. Don't be surprised if the next round of acquisition reform makes fundamental changes to the FAR that enable these models to be used by the Government.

Web technologies are also changing our internal infrastructures and business practices. Knowledge workers can now collaborate on the web. Organizations that used to work exclusively on LANs with co-located staff, with local control, are now working in a more dispersed context. Infrastructures are opening up as well. Web technologies are also changing how software is purchased. Application service providers (ASPs) provide web-based functionality on a subscription or transaction basis, instead of a sales/installation basis. Companies are already outsourcing email, customer relationship management, enterprise resource planning, file storage, and even accounting software to ASPs. Web-based proposal software that you can rent on a per-project basis instead of purchasing and maintaining is on the way.

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Interested in your association?

Have you considered
attending an NCA
Board Meeting?

Your input and ideas
are important to your
committee!

For further information,
please contact NCA
President Carl Dickson at
703-883-9112.

July Roundtable

Topic: Addressing the full spectrum of what
it takes to win new business.

Date: July 19, 2000

Speaker: Doug Allston,
President and Co-founder of Advantage Consulting

ABSTRACT:

To win new business, a company must find, capture, bid, win, and grow the opportunity. Success requires more than just a good proposal. In most companies, a different group of people is involved at each step. Success requires them to work together, understand each others issues, and properly manage the hand-offs. Mr. Allston will present his insights into the relationships between the participants and best practices for addressing the full spectrum of what it takes to win.

Calendar of Events

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

JULY	10	NCA Board Meeting	• Topic: General Business
	19	NCA Roundtable	• Topic: Addressing the full spectrum of what it takes to win new business.
<hr/>			
AUG	14	NCA Board Meeting	• 5:30 p.m.
<hr/>			
SEPT	11	NCA Board Meeting	• Topic: General Business
	20	NCA Roundtable	• Topic: Building Proposal Consensus" Speaker: Charlie Hooper

Designing the Proposal...

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technically adept and savvy with experience. It is a highly dynamic hands-on task, not a detached, administrative position. The design engineer is intimately involved with all the details of the proposal and must be able to readily discuss all aspects of the proposal with other team members.

PART TWO—THE LEADER

The leader in the proposal designer directs the proposal team's focus. The leader is the team visionary. The leader must have and maintain the professional respect of the other members of the team. The leader is mentor and facilitator to other team members.

PART THREE—THE MANAGER

The managing part of the proposal designer is responsible for project resources, for getting things done on time, and for quality of both the product and the process. This includes overseeing and measuring the performance of the proposal team and making constant evaluations of the quality of the proposal being produced.

Six Responsibilities of the Proposal Designer

The responsibilities for producing a winning proposal include:

1. creating a winning vision
2. designing the proposal as a unique product
3. acquiring resources
4. managing resources
5. directing team performance



6. measuring quality

The designer constantly assesses the proposal team's performance and devises methods of assistance or intervention to maintain the overall quality of the final proposal. The designer orchestrates continual quality assessments of the product as the proposal evolves.

How to Create a Winning Vision

We create a "vision" of something when we first "tell" about it, or "show pictures or drawings of it. To create a "shared vision" within the proposal team we do a lot of "telling and showing," to establish a common information base. That is the first step: creating a common information base. The second step is to get the team members to "buy in" to doing their part, to "step in" to their part of the vision, in a sense to envision themselves doing the tasks and finally "picturing" the quality of the product.

A complete and clear vision helps everyone involved understand the

proposal content and its intended impact. Creating a vision is a well coordinated marketing effort that begins before the RFP is issued. It is a highly targeted form of advertising that requires a design team that fully understands both the process and the product of that process. A winning proposal requires that the proposal team understands what needs must be met and how they are going to be met.

The designer and the core team, provide the vision of the end product (the proposal) in several ways:

1. Full review of the opportunity by management or marketing,
2. Complete review of the customer's requirements,
3. Planning sessions in which the resources, assignments and scheduling for the tasks are captured.

The outcome of the reviews and planning effort will be a written and well-illustrated document that becomes the baseline for the project. We use reports, storyboards and briefings that capture what the final tangible product will be, and we change and review the storyboards continuously throughout the entire process. We use well-designed and highly effective graphics to show the team's progress—we update the information every day.

How to Design the Proposal

The measure of a good proposal design is the measure and assessment of two key elements in the proposal's design.

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Frequently Asked Questions about APMP

What does APMP stand for?

The Association of Proposal Management Professionals

What does NCA stand for?

National Capital Area, a chapter of APMP

How often does NCA meet?

Round table dinners are held on the 3rd Wednesday of every other month (January, March, May, July, September, November).

Board meetings are held on the 1st Monday of every month.

Is membership required to attend the meetings?

No.

Who should attend NCA meetings?

Anyone interested in proposal and business development

In addition to proposal specialists, this may include project managers, marketing professionals, corporate executives, graphic artists, and tech writers.

Bring a friend or colleague!

What topics do you address at meetings?

Most meetings (but not all) focus on preparing proposal in response to Federal Government RFPs.

SIGs and other forums are being formed for other topics.

The most popular meetings are those with speakers who have been proposal evaluators or have insight into acquisition practices.

We are very responsive to feedback. If you want a particular topic, just ask. Better yet, recommend a speaker.

Where does NCA meet?

Roundtables are normally held at the Tyson's Corner Hol-



iday Inn.

Alternative locations, tours of proposal facilities, and other venues are considered on a case by case basis.

Does NCA publish a newsletter?

Yes, it's called *The Executive Summary*.

It's a traditional paper-based newsletter. Copies are available on this site.

Theoretically it's published every other month, but we're a volunteer organization and sometimes it's a struggle.

What does the Board of Directors do?

Everything it takes to make NCA happen. The Board makes decisions, sets policy, and oversees operations. These primarily include planning/hosting roundtables, marketing, newsletter publishing, and maintaining this Web site.

How is the Board organized?

President, Vice-president, Treasurer, and 2 at-large seats

How can I get on the Board?

Attend the board meetings as a non-member to gain experience.

Find something that NCA should be doing, and do it.

Be nominated, or nominate yourself, at the next annual election (November roundtable).

How can I contribute to NCA?

Act as a point of contact.

Host a meeting.

Be a SIG leader.

Submit articles to the newsletter.

Help distribute NCA brochures and encourage others to attend our meetings.

Forward our email announcements to everyone you know who may be interested.

Give people our URL.

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Designing the Proposal... *Continued from page 4*

THE MEASURES OF DESIGN

Content—Structure, Substance, and Form

The proposal's design content includes three things:

1. structure (the organizational framework)
2. substance (everything that goes into the proposal)
3. form (the outward expression of structure and substance).

The content of a proposal is what the team typically creates and manipulates when they produce the proposal. The Strategic Summary is the key document for developing a solid structure for the design effort. The Response and Expanded Response Outlines are the key documents for the substance of the design. The Storyboard is the key document for conveying the form.

IMPACT

Understanding how the design of a proposal will impact its audience is critical to the process. A designer must know—not just identify, but really know—who will see and read the proposal, why they will see and read it, and how they will evaluate it. Knowing who will experience the

proposal, as well as how and why, not only affects the content, but often leads to the development of specific behavior patterns for those working on the design.

How to Acquire Resources

You have probably seen the impact of a lack of resources on some proposals and you may have seen a waste of resources on others. In order to define what actual resources are necessary we must:

1. have good metrics established to accurately estimate the effort
2. have good knowledge of the final product
3. have good knowledge of the flexibility required to accommodate the dynamics of the decision makers—are they going to have a hard time making a decision? Will they change their minds?
4. have good knowledge of the dynamics of this unique proposal—are there likely to be mid-stream changes?

The designer must then acquire and allocate seven separate types of resources to make the proposal possible. ■

Rich Freeman is a freelance Proposal Manager based in Northern Virginia.

MAY 17 NCA ROUNDTABLE

The NCA was fortunate to have Les Davidson as its speaker at the May Roundtable. Les is the Policy Advisor for the Office of GSA Acquisition Policy. He has followed GSA acquisition for 24 years and has contributed to its change from a manual, rule based, low price policy to an automated, high speed, low effort, buyer judgement based, best buy policy. He pointed out that the Government continues to down size and to have shrinking budgets. Changes came out of necessity to allow the Government to procure quality goods and services on a best buy basis while reducing the procurement overhead and reducing the time required for acquisitions.

Les says that the procurement system was badly broken six years ago. Most procurement were based on low price, there was little quality evaluation and the process was slow. The main thrust of the reforms has been to give the buyers more power and to allow them the flexibility to talk / negotiate with bidders so as to remove confusion and to allow the products / services to be optimized to fully meet the government requirements.

The other major change has been the extensive use of orals. Les really likes the oral process because it allows the government to easily and rapidly evaluate a variety of offers. He feels it is low effort for the government and allows evaluators with less technical knowledge to be effective.

The electronic procurement has also speeded the process on the procurement of standard products and services. Technology has also had a major impact on complex (RFP type) procurement. The WEB now serves as the conduit for the distribution of the RFP, modifications, questions and answers and often for the delivery of the proposal.

Les feels that the trend toward government downsizing and reduced government budgets will continue. This wind of change will drive the wave of procurement toward ever more efficient, high speed, low cost methods. Technology will be further exploited and new techniques will be developed to further streamline the process.

NCA member enters politics

We received the following email from one of our members:

I appreciate your e-mails and the APMP NCA Chapter newsletters I have received for years. I have worked in proposal management and business development for about 15 years now.

I just wanted to inform you and the organization that I was elected to the Virginia State Senate in November of 1999, and am now serving as a Senator in Richmond VA. I thought you might find it interesting that someone from our ranks is now serving the Virginia Legislature. — *Nick Rerras*



Congratulations Nick!

Frequently Asked Questions About APMP... *Continued from page 5*

Attend Board meetings.
Speak up. Volunteer.

Can consultants use NCA to promote themselves?

NCA does not exist to promote consultants. But contributing to NCA can help you get your name out there, and that can't hurt.

Can NCA help me advance my career?

NCA roundtables provide an excellent opportunity for networking. If you become a contributor this is even more true. Attending NCA meetings also provides you with opportunities to learn and grow.



What is the difference between APMP National and NCA?

	National	NCA
Membership	Approximately 1300	Approximately 543
Mission	Advance the arts, sciences, and technology of proposal management	Provide networking and professionals development opportunities
Programs	Annual conference, newsletter	Roundtables, SIGs, newsletter
Geographic Area	National	Washington DC metropolitan area
Dues	\$75/year	None
Job Bank	Yes—on their Web site	No
Web site	http://www.apmp.org	http://www.apmp-nca.org

President's Corner... *Continued from page 2*

Proposal processes are changing as well. The composition of solicitations, especially in the information technology sector, has been changing. The structures of RFPs are changing to adapt to electronic distribution. Web-based information processing is essentially forms-driven. Proposals will become more like form responses. If you think proposals are too complex, remember that people thought that selling services via GSA schedule wouldn't work either. Look for a more direct correlation between the evaluation criteria and the response outline to better enable online procurements. Also look for quicker turnaround times, more interactivity, and multi-media to finally become common place.

These changes are also having a major impact on the proposal profession. Already we're seeing a diminishing need for someone to specialize in producing huge paper-based submissions. What is not diminishing is the need for someone to facilitate the process of

communicating the information required to bid. Proposal specialists must become more generalized as the need shifts from producing a specific tangible deliverable as part of the processing of submitting a bid, to facilitating communication in many potential formats (online, oral, paper) as part of the overall business development process. The proposal process is becoming increasingly integrated with business development and even project management. Production skills, which used to be a separate specialty, are quickly becoming part of what every proposal specialist needs to know to facilitate communication. Flexibility in both skills and process is becoming more important than ever.

The impact of these changes is being felt within NCA as well. We must reach out beyond the core of paper-based proposal developers and look at who is impacted by the need to submit proposals. For years, there has been a trend toward project managers pro-

ducing their own proposals. We should reach out to them and offer what we know about the best practices for developing proposals. We may no longer be able to afford to see ourselves as a specialty separate from business development. We should reach out to sales people, marketeers, and capture managers to help them complete the flow of information required to win new business. I'd like to end this discussion with an invitation to those who don't see themselves as proposal specialists and yet are personally impacted by their companies ability to win new business. If you are a proposal specialist, and you work with project managers or business developers who fit this description, bring them to the next roundtable. We need to talk. We're all going on this wild ride together.

PS: Wasn't all this acquisition reform, web-technology, and paperless procurement stuff just supposed to be a fad?

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**Moved?
New Job?
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LET US KNOW!

If you've changed email addresses recently, make sure you add the new address to our list so you can continue to get the roundtable announcements. You can add yourself at <http://www.apmp-nca.org>.