The Executive Summary

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Special Considerations for Proposal Software

By Carl Dickson

REQUIREMENTS ALLOCATION OFTEN FAILS THE 80/20 RULE

When seeking to automate the proposal process, the first place many people look is for software to support requirements allocation. Requirements allocation software helps create and manage the proposal outline, linking the requirements to writing assignments. Because it requires the RFP to be available online in a particular format, it may include an RFP parsing capability. The complexity of parsing RFPs and of linking requirements tends to make this type of software expensive. Even worse, requirements allocation software tends to be unreliable—RFP parsers often make numerous mistakes, and most outliners break when an amendment is issued. They are often one-way tools—you can enter a set of requirements and outline it, but any editing to the requirements set or outline after that must be done manually.

For most customers, requirements allocation software will not produce the best potential return on investment. Requirements allocation software may not actually save you any time! Automation saves time by reducing repetition. It can speed up well-defined steps. However, the time spent in creating an outline is mostly spent thinking! No matter how well designed, requirements allocation software cannot write the outline for you.

IN THIS ISSUE

DATABASES VS DOCUMENT MANAGEMENT FOR RÉSUMÉS, PROJECT SUMMARIES, AND BOILERPLATE

Companies with online résumé and project summary resources tend to call them "databases." In most cases, they incorrectly use the term. A collection of files is not a database.

A relational database is a structure based on tables and a query language to extract data from the tables. Each row in a table is a record, and each column is a field. Databases work great when you can specifically define the fields in each record.

However, relational databases tend not to work well for some applications such as résumés. If you try to define fields for common résumé items (summary, education, experience), you'll find that picking the right granularity is difficult, and even if you manage to come up with a perfect field list, you'll find the résumés you have don't match. This leads to creating database forms and having everybody enter their data into the very specific forms. That's a lot of programming. And then you have a problem going from the résumé-as-table to the résumé-as-document for the proposal.

Keeping the résumés as documents is probably better, but then your only search mechanism is keyword searching. Keyword search can be effective, but on résumés the same word in different sections takes on a completely different meanings. Keyword searching résumés is usually less than effective.

The same issues that have applied to the résumé examples above also apply to project summaries, boilerplate, and other text-resources you may want to have for your proposals. Before committing to a true "database" development project make sure you know what you're getting into and that the data model you build actually fits the way you are going to be using the application.

THE CHECKLIST-DRIVEN PROPOSAL

Wouldn't it be nice to just check-off the items you want in your proposal and have your computer spit out a first draft? This rests on the assumption that the contents of your proposals are similar enough to use this

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President's Corner by Carl Dickson

Instead of our normal speaker presentation, our roundtable in January is very much going to be a working session. Nonetheless, it may be one of the most information packed. The primary topic is going to be NCA itself and the agenda includes elections, answers to frequently asked questions, and an interactive forum to identify points of contacts within NCA.

The election is an annual affair to select the officers to serve on the NCA board of directors. A slate of officers will be presented and nominations taken from the floor. Self-nominations are encouraged. Details on the slate and the process are in a separate article in this issue.

We are also putting together a presentation to answer frequently asked questions about NCA. We find that even those who attend the roundtables on a regular basis often don't know how APMP is organized, the differences between APMP/National and APMP/NCA, or what it takes to make the chapter function. This presentation will help you better understand what NCA is all about and how to get the most out of it.

The second half of the roundtable will be a presentation of points of contact within NCA. Who do you talk to about membership in APMP? How do you find out when the next roundtable is? How do you get into the job bank? Is there a list of consultants who can help on proposals? Who do you talk to about storyboarding, proposal production, processes, or other special interests? We plan to introduce key people and contacts, and to circulate signup sheets to help those with common interests to find each other. Our goal is to create even more networking and professional development opportunities for those who attend.

If you have a question that you'd like to see answered, or would like to be a point of contact for a particular topic, please email cdickson@optym.com. ■

Happy Holidays &

Best wishes for the last year of the millennium from the NCA Board

November NCA Roundtable

Since the September Roundtable got blown away by an anticipated hurricane, this was the first gathering since the July Roundtable. The event was attended by 47 proposal dinks that seemed to have a wonderful time.

The guest speaker was **Denise Rhea-McKenzie** from PRC's Defense Systems Proposal Development Center. She presented their new and exciting Virtual Proposal Center. She was online as she spoke and gave demonstrations of many of its features. The system was supporting nine concurrent proposals and had the capacity to accommodate one thousand users. She stressed the amount of control she is able to gain over the proposal process by having the software place restrictions on the proposal team members. She makes the proposal development rules and it is difficult for the team members to violate them.

Bob Crawford presented a slate of officers for the election to be held at the January Roundtable. There will be only five board members to be elected. The slate presented consisted of **Carl Dickson** for President, **Bob Crawford** for Vice President, **Lou Robinson** for Secretary/Treasurer, **Gene Alfaro** for Member One at Large and Member Two at Large remains open at this time. Carl explained that the board will appoint people for functional areas such as Programs, Membership, Meetings, Newsletter and Advertising when required.

A new APMP-NCA brochure was given to all that attended. It was requested that the brochure be passed along to others who are potential APMP and/or NCA members. ■

Calendar of Events

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

				Contact Phone No.
JAN	10	NCA Board Meeting	• Topic: General Business	202-293-4987
	19	NCA Roundtable	• Topic: Election and NCA Points of Contact	703-883-9112
FEB	6	NCA Board Meeting	• Topic: General Business	703-883-9112
MAR	6	NCA Board Meeting	• Topic: General Business	703-883-9112
	22	NCA Roundtable	• Speaker: TBD	202-293-4987

NCA Elections Held

By Bob Crawford

The National Capital Area Chapter will be holding an election at the January Roundtable to elect its officers and at large board members. The positions to be voted upon are President, Vice President, Secretary/ Treasurer, and two at-large board members. Their term of office will run from January 2000 through December 2000.

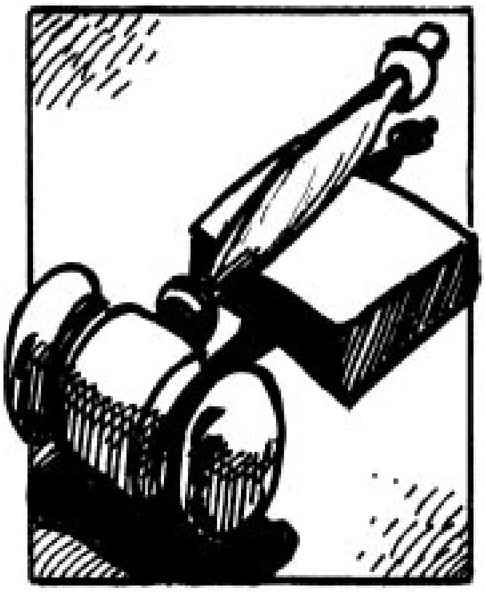
The paragraphs that follow describe the role of each of the positions and provide experience highlights for those who have been nominated. Currently only one individual has been nominated for each position. We welcome other nominees and will ask if there are any additional nominees at the January 2000 Roundtable before we vote on the proposed slate.

President

The President is responsible for all activities of the NCA and for all liaison with National. He/she presides over all meetings . He/she provides leadership regarding the goals of various committees of the NCA

Carl Dickson is the current NCA President. He was elected to a two-year term in January 1999, but because the board has been restructured, the position is up for election in order to synchronize it with the other board positions. Consistent with the restructuring of the board he is being nominated for a one year term commencing January 2000.

Carl has been an APMP member for more than 6 years and is the Vice President of Electronic Commerce Solutions at OPTYM Professional Services, Inc. He created the original APMP website and continues to host and support it. Carl has spent his entire professional career in the proposal field, starting off in production and rising to proposal management. At OPTYM, he leads a business line whose mission is to help contractors apply technology to their business development and proposal efforts.



Vice President

The Vice President implements NCA's Corporate Partner Program, chairs NCA's election nominating committee, serves as President when the NCA President is absent, and leads special activities as requested by the President.

Bob Crawford, the current NCA Vice President, has been nominated again for Vice President. He was elected for an 18 month term at the July 1998 Roundtable. Consistent with the restructuring of the board he is being nominated for a one year term commencing January 2000.

Bob is the Vice President, marketing for Organizational Communications, Inc. and has been a member of APMP since 1997. In his 35 years of experience he has served as a proposal manager, sales manager, sales representative, a sales engineer, product manager, data base/network design consultant and technical trainer. He has written and directed proposals valued from $100K to $500M. For these opportunities, he has focused primarily on opportunity identification/qualification, bid capture strategy development, engineering solution development, technical writing, and proposal management. He has worked for IBM, GTE Information Systems, ISN, Versitron, and Harris as well as his own consulting company.

Secretary/treasurer

The Secretary/Treasurer fills two roles. As secretary, he/she records the minutes of board meetings, prepares official NCA correspondence, and forwards brown bag and roundtable attendance lists to APMP National. As Treasurer, he or she receives monies collected by the Meeting Coordinator Chair for roundtables, pays NCA bills, maintains NCA's checking account and financial records, and prepares all required financial reports.

Lou Robinson has been nominated again as Secretary/Treasurer. He was elected for an 18 month term at the July 1998 Roundtable. Consistent with the restructuring of the board he is being nominated for a one year term commencing January 2000.

Lou is the Cofounder and Chief Executive Officer of Winning Proposals, Inc. In this role, he provides corporate management; planning, finance, and contracts administration; client marketing; and consultant recruiting. Lou's 25 years of experience includes proposal management and development, business development, and corporate financial planning and tracking. He has 15 years experience as a corporate Secretary/Treasurer. Lou joined APMP in 1995 and provided assistance on a survey for the Electronic Procurement Task Force.

At-Large

The two at-large positions may be committee chairs or simply interested members who are willing to devote the time. As the name implies these two board members, along with the three officers are responsible for the making any necessary decisions pertaining to the operations of NCA as a chapter of the APMP

At this time there is only one candidate for an at-large seat on the board, Gene Alfaro. Gene, a long-time proposal professional is leading the NCA efforts to implement Special Interest Groups (SIG's) through our revamped web site.

We welcome any person who is willing to be nominated for the other at-large seat. ■

Tips on Commercial Proposals or Bids

"Tell 'em, and tell 'em, and tell 'em again"

by Rich Freeman

When I first heard him say it, I felt that he was just spouting an arcane cliché that had no real meaning. After all, *I* was the English major and *he* was the engineer. *I knew* the use of repetition to add emphasis, but favored a more moderate use of the technique. The engineer was adamant, "We're gonna tell 'em three times! *If we don't tell 'em three times, they ain't gonna get it!*"

The proposal was lengthy—very lengthy. I spent six and a half hours editing the technical section. Even with my cuts, I felt sure that we would bore the reviewers to death. Perhaps the reviewers would be anesthetized into giving us high scores. Maybe they would just put the proposal on a bathroom scale and award the heaviest proposal.

Well, I made my cuts. And the engineer, who was volume captain, told me, "Put it back."

"You made too many cuts!" he said. "Put it back."

"Repetition," I said, "Unless handled with care, creates a very boring response."

"Put it back." he said

I developed a huffy attitude. I said "Clear concise language is more compelling than repetitive drivel!"

"Put it back!" he said.

He was the boss, I, the hired gun...I put it back.

The proposal we sent out was not a work of art. I t was *really* too long. It was *really* very boring to read. It could *really* only have been improved with good editing. Nevertheless, it won.

And—I must admit—the engineer's insistence "Tell 'em, and tell 'em, and tell 'em again." was one of the keys to winning.

"Perhaps," I thought, "I should rearrange my attitude, and listen..."Tell 'em, and tell 'em, and tell 'em again?" Figuring out how to do it wasn't hard at all.

TELL 'EM, ...

The challenge of telling them the first time is not so great. Just rearrange the requirements a bit. Replace the "shalls." Use present tense, not future! The reviewers should "see" what you "do."

TELL 'EM, ...

How do you tell 'em the second time? It isn't as hard as you might think. Just tell 'em *who* is going to do the job and throw in the details again.

...AND, TELL 'EM AGAIN...

The third time's a charm. Just tell 'em *how* you did it before, and *for whom.* ■

Rich Freeman is a Global Solutions Bid Manager for MCI WorldCom, and is the Production and Composition Manager for the APMP Professional Journal.

"You made too many cuts! he said. "Put it back."

"Repetition," I said, "Unless handled with care, creates a very boring response."

"Put it back," he said.

Special Considerations for Proposal Software...*Continued from page 1*

approach. Even if your proposals are very different, you can probably use this approach for part of your proposals. If you do task-order proposals, which are increasingly common, this approach may be the only way you can respond to the numerous quick turnaround responses required.

So how do you build a checklist driven proposal system? Most people simulate it through various file organization schemas. Some people have built macro systems to bring together the various files. You can also build a database to index your files and provide a true checklist interface.

The problem isn't creating the system, it is maintaining the system. How do you add new items? What do you do when you create a first draft proposal, and then make changes? How do those changes make it back to the original? How do you track multiple versions? Can you make it simple and flexible enough to enable others to use the system?

If you can combine the database approach with a document management system, it is possible to achieve all of the above. The document management system provides the version control mechanism and the database provides the checklist system. In fact, if fully integrated, the two will not only be seamless, but will draw on the same categorization system to dynamically combine the profiling system of the document management platform with the generation of the checklist for document assembly.

You will probably not find this level of functionality already built in to any currently existing COTs software. However, if you carefully research the data models and integration options of the components it may be possible to build a system like this with a minimum of custom development.

Past Performance Record Keeping vs Project Summaries

In the past, project references were static summaries that were often kept as a collection of re-use files. With the advent of past performance evaluations, this way of keeping project information may no longer meet all of your needs.

A collection of static files may not provide what you need to know about a project to get the best possible past performance evaluation. For a successful past performance evaluation you need a current contact at the customer that will speak well of your performance. If nobody answers when the evaluator calls, you will get a neutral rating (5 out of 10) and that can ruin your overall score. If the person that answers does not know you, or worse, speaks poorly of you, your score will be even worse.

With a collection of static files, the only way you have to anticipate your past performance evaluation is the input of the project manager. It runs against human nature to advertise your mistakes and poor performance. Also, people have limited, biased, and sometimes selective memories. A better source for project performance information is the status reports that almost every project manager is tasked to provide.

A past performance record keeping system links the static project summary with these reports to provide a project history. This history can be reviewed prior to submitting a proposal that includes the project to identify weaknesses that should be proactively responded to in your proposal.

A past performance record keeping system takes a much larger level of effort to set up than a static project summary system. A record keeping system also presumes access to the records, which may require changes to internal project management procedures — something that may be beyond the reach of a proposal manager and will usually require executive level decisions. With past performance counting for as much as 50% of your evaluation score, there is significant reason to consider taking on the larger effort.

Storyboarding — Online or Off?

The classical storyboarding approach involves posting your storyboards on the walls of a large conference room. The primary benefit of this approach is to be able to ***see*** the entire proposal. The user friendliness of this approach can't be beat. Approaching it online is extremely difficult. The closest most people get is to make the electronic file of the storyboard available online for viewing one at a time.

Rather than try to duplicate the "wall," the use of electronic tools enables new approaches to the concept of storyboarding. Remember, the goal is not to create a storyboard, but to implement a step that ensure that a proposal's planners know what is going to be written prior to committing the effort. Rather than developing storyboards as static documents that are left behind when it is time to write the first draft, electronic tools (especially web-based tools) can enable storyboards to become ***interactive***.

Instead of thinking of a storyboard as a **document**, think of it as the transcript of a **discussion** broken down into granular topics. An electronic storyboard can implement the headings of a classical storyboard as **topics**. Each topic can start with instruction from the proposal manager. The proposal manager, or other reviewers, can suggest changes or elaboration. The development of the storyboard can go back and forth until the team understands what needs to go into the section and is ready to write the first draft.

For example, a proposal manager might start of a topic on section themes by providing instructions (what is a theme anyway), examples, and references to the evaluation criteria. The proposal team can then provide a first cut at some themes. The proposal manager (or other reviewers) can then recommend changes. (While that is a good theme, taking this evaluation criteria into consideration perhaps we should emphasize this. Based on what you know about this customer and this technical subject, can you think of a theme to do that?). When the team is ready, and they start the draft, they can cut and paste from the discussion any relevant write-ups. The entire process can be monitored and participation is quite visible. ■

...To be continued...

The Key Components of Orals Coaching

By Helane Jeffreys

The FAR-15 now encourages the use of oral presentations to streamline the proposal selection process and emphasizes the importance of having government evaluators meet face to face with key contract personnel in an orals presentation session. Firms that have been writing winning proposals now have to learn new skills to compete in this component of the source selection process. They will have to prove that, in addition to being the best qualified to implement the contract, they can also communicate effectively and create a positive relationship with government representatives.

In many cases, companies used to submitting written proposals may not be prepared to make personal presentations and may appear uneasy when questioned by government officials about their bids. A highly qualified team of experts, with outstanding résumés, who are nervous and uncomfortable in the presenter role, may be viewed as lacking the ability to do the job. In fact, they may very well be the best selection for the contract.

The job of a professional orals coach is to enable presenters to effectively convey their expertise, experience and ability to accomplish the contract's requirements. Corporate team members come to orals coaching with differing levels of skill. Therefore, each person typically requires something different from coaches so that they can tap into their own natural presentation style and truly show what they have to offer.

Below are key areas of inquiry which illustrate the goals of orals coaching:

- **Verbal and Nonverbal communication:** Do you use your voice effectively with variety in volume, pitch inflection and use of pauses? How can you best hold your audience's attention during a lengthy presentation?
- **Content clarity of script and visuals:** Do your key points truly reflect your intended message? Do you clearly state the "take aways" and "discriminators" for the audience in your script and for each visual projected on the screen? How do you incorporate personal experiences to add variety and interest?
- **Practice and Time Management:** Do you have a system for managing time both in practice sessions and in the actual orals presentation?
- **Question and Answer/Sample Task Sessions:** Do you have knowledge of your proposal and can you convey it concisely? How well does your Team Leader demonstrate knowledge of the contract as well as the ability to coordinate the team's resources for responding to Sample Tasks and Clarification Questions?

When key personnel are operating at their best in the orals presentation, the government has the needed information to enable the optimal selection of an offerer for the contract.

This is a "win-win" for both the government and the corporate bidder. ■

For information regarding orals coaching contact:

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Bulk Rate
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so you can continue to receive the latest NCA information.