

The Executive Summary

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*Association of Proposal Management Professionals

Capture— The Often Missing Process

BY JOHN BENDER

Customer relationships built during the earliest phases of business development are critical to success in gathering detailed information during the capture process. It is at this stage you get to know what a potential customer really wants and needs and whether you are the best company to provide it. No company can afford to bid every new business opportunity they find. Those companies who separate the potential losers early can allocate resources for maximum payoff.

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Many government contractors do not understand the capture process. They don't realize there is a difference between a lottery and government contracting. You may win a lottery; but you must earn and be awarded a government contract. The name of the game is Earning Real Work. Revenue and profit are the desired results rather than the development of a large number of proposals.

Capture takes time and often begins 12 to 36 months before RFPs are released. Companies that are unable or unwilling to invest in getting to know their potential customer's have not earned that customer's work.

How do relationships help during capture?

Personal Access Leads to Details

The three most important reasons for building personal relationships with potential customers are access, Access and ACCESS!

Smart companies use their access to discover everything they can about a new business opportunity as early as they can. It becomes part of their competitive advantage. These companies realize they are usually too late by the time the CBD (Contractors Been Decided) notices are out. Discovering an opportunity when a final RFP is released is such a long shot your lottery chances are probably better.

We estimate that only 60 percent of the information a company needs to win a contract is available publicly from RFPs, research subscriptions, etc. To obtain the rest takes real work and

The three most important reasons for building personal relationships with potential customers are access, Access, ACCESS!

many companies do not do it. They jump right into a proposal and hope the law of averages will bail them out if they do enough of them. This burns out proposal professionals who become the fall guys for a flawed process.

Enlightened companies who understand captures importance really get to know the potential customer. Their access to the customer allows them to get past the customer's stated needs. Behind the public facade are goals, personal aspirations, constraints, budgets and hidden agendas. Successful companies gather these important factors for inclusion in their proposals whether for a new contract, a Task Order or GSA Schedule work.

Recent procurement regulation changes confirm each potential contractor's ability to discover details about a coming contract opportunity without forcing disclosure to other bidders. Some feel this changes the level playing field. They are absolutely right! While some companies work harder during

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President's Corner by Lou Robinson

A New Start to a New Year for NCA

It saddened us all when Rich Freeman, our newly elected president, was stricken with a health problem that forced his resignation. Rich had worked very hard in setting up programs and bringing in talented people to provide new energy and direction for the NCA. Rich is on the road to recovery and continues to work for the NCA.

When I became President, I was in shock because I had not expressed interest, had not been nominated and had not been elected. However, as the shock (and perhaps a little panic) subsided I became excited because I discovered that I have a rare opportunity. I quickly discovered that Rich had new programs in motion that were being led by new and energetic people.

It is now clear that my job is to provide leadership to these programs and provide the necessary support to see them prosper. In a sense, I am getting a ride and we will all benefit from this ride. This ride will make us better, bigger and stronger. This vision is dependent on all of us working together with determination and conviction. We live in the proposal capital of the world, and we are obligated to provide the best APMP Chapter in the world.

Let us review some of the objectives Rich established:

Bigger and Better Roundtables—Our first roundtable of the year had an outstanding speaker, Dr. Allan Burman, and was attended by 30 people. Tom Porter has now become Program Chair (as well as Vice President) and is set-

ting up some exciting new programs that will attract more people and provide more insight into the proposal process.

Member Communication—Our e-mail and postal address database is being repaired. Rich Freeman with support from Carl Dickson is making corrections to the addresses and developing maintenance techniques to assure they remain accurate.

Broaden The Interest Base—We are working to provide interest in all phases of Business Development. While the focus on the proposal process will remain the central theme, we will also have focus in all areas business development. This focus will be both from the client and buyers point of view.

More APMP Emphasis (a new one)—In the past, there has been some separation between APMP (the National Organization) and NCA (a chapter of APMP). The mission of all of APMP is to provide members with information and opportunities to improve their professional performance. The methods the two groups use are different, but the goal is the same. I am looking forward to jointly working on our mission together. We are fortunate in having Eric Gregory, the APMP CEO, in our area. He attends our roundtables / board meetings regularly and provides assistance and guidance. I think there will be some joint events in the future.

This is an ambitious group of objectives. They will require a lot of energy. We will be calling on a lot of the membership for support. Please determine areas where you would like to help and volunteer. If any of the board members call on you for support, please step up to the line and do your part. We can, and will, make the NCA better this year.

Thanks,
Lou Robinson



May Roundtable Event Announcement

Competitive Intelligence in the Proposal Process

By *Kim Kelly*, International Launch Services

Location: Tysons Corner Holiday Inn on International Drive in McLean, VA
Networking Begins 5:30 p.m.; Dinner: 6:30 p.m.



This presentation is an outgrowth of the alliance started last year between APMP and SCIP, the Society of Competitive Intelligence Professionals. A detailed announcement of the APMP/SCIP alliance can be found at the APMP national Web site (<http://www.apmp.org>).

Mr. Kelly will be discussing the role played by competitive intelligence analysts in the pre-RFP, proposal development, and post-submission phases. He will describe how to interface with the customer, what to pull from the RFP for CI purposes, how to fold CI into the evolving proposal, and how to enhance your offer or positioning between submission and award.

Mr. Kelly is a Manager, Business

Development for International Launch Services, a joint venture between Lockheed Martin and two Russian companies. Kim has worked in the Proposal Development field for 19 years. He started in 1982 with IBM Federal Systems, which was later acquired by LM. Since 1991, he has been a full time Competitive Intelligence professional. He has provided major CI studies to proposal teams at 10 different LM locations. He is a member of both APMP and SCIP, the Society of Competitive Intelligence Professionals. Kim was instrumental in LM's selection as one of the twelve companies (and the only aerospace company) for their best-practice CI operations by the American Productivity & Quality Center (APQC) in 2000.

Board of Directors Announcement

NEW DATE FOR JULY ROUNDTABLE

July Roundtable (7/11/2001)—Joint event with the Georgia Chapter, with simultaneous broadcast of a joint program on using modern tools for holding dispersed meetings and supporting virtual proposal environments. Note the special date switch from the third Wednesday to the second to compromise on the two chapters' normal schedules. Details on the locations of this event and the agenda (which will be jointly presented from both areas) will be forthcoming.

Calendar of Events

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

MAY	1	NCA Board Meeting	• Topic: General Business
	16	NCA Roundtable	• Topic: Competitive Intelligence in the Proposal Process; Speaker: Kim Kelly, International Launch Services
JUNE	5	NCA Board Meeting	• Topic: General Business
JULY	3	NCA Board Meeting	• Topic: General Business
	11	NCA Roundtable	• Topic: Joint Event with Georgia Chapter

For information regarding attending Board Meetings or Roundtables, please phone Lou Robinson at (703) 533-2102

Are You Certifiable?



There are the times in the career of most Proposal Managers—say, for instance, after you’ve crammed a two week’s work into two days to meet a deadline—when the answer to that question is probably “Yes”. But certification is soon to take on a different meaning. An APMP committee, headed by former COO Bill Painter, has developed a draft program for professional certification as a Professional Proposal Manager (PPM).

Important details are yet to be worked out but it is likely that the approved plan will be nearly identical

to the current draft. Since a formal certification program represents a significant step in the evolution of APMP, not to mention the careers of individual members, you should know what is developing and have the opportunity to provide your thoughts to the committee and the Board. Toward that end, the following is a brief what, why, who, how, where, and when of the program as it is currently envisioned.

What?

The program’s objective is to document skills and knowledge acquired through experience, education, and practice. Certification will be achieved by satisfying experience and educational requirements and successfully completing an examination. It is not a licensure program but rather a career development option available to all that are eligible. It is entirely elective in nature and offered to members and non-members on a voluntary basis. It will be necessary to maintain certification by completing a prescribed series of continuing education credits every five years.

The initial program is only for certification as a PPM. As the program matures, certification categories will probably be added, e.g., Acquisition Manager, Proposal Writer, Proposal Coordinator, Proposal Production Manager, etc.

Why?

The program responds to the membership’s desire for a formal framework to recognize achievement in proposal management skills and experience. In formal and informal polling of APMP members over the years, there has been strong support for a certification program, mainly for the following reasons:

- Acknowledges expertise in the proposal management field
- Establishes proficiency by setting

standards, and recommending education and training, in the fundamentals of proposal management

- Establishes a level of credibility in the industry for the individual and APMP

While certification cannot guarantee ability, it does ensure the individuals and their prospective employers that an accepted standard of knowledge and experience has been met.

Who?

To be eligible for PPM certification, an individual must have a top-level understanding and working knowledge of the proposal development process in an operational environment, exposure to the complete range of activities involved in most proposals, and direct participation in most or all of the activities typically comprising proposal development and typically managed by the Proposal Manager.

Candidates applying for certification must satisfy the educational and experience criteria for one of the following categories of certification and must pass a PPM examination.

CATEGORY A

At the time of application, the candidate must hold a bachelors/equivalent degree and two years experience in proposal development leadership positions that include having performed at least 15 of the following 25 functions:

- RFP Analysis
- Customer/project analysis
- Customer communications plans
- Competitor analysis
- Proposal strategy and themes
- Staffing, roles, responsibilities
- Outlines, schedules, budgets
- Storyboard development
- Compliance matrix development
- Writing/editing management
- Graphics development
- Executive summaries

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 Chief Executive Officer Lou Robinson at 703-533-2102 or e-mail win-pro@prodigy.net

- Volume management
- Customer evaluation processes
- Oral proposals, briefings
- Proposal process tailoring
- Proposal kickoff meetings
- Proposal reviews
- Acquisition trends
- Cost estimating
- Proposal operations
- Proposal management software and electronic procurement
- Post-submittal management
- Customer debriefs and analysis of lessons learned
- Library/reuse management

CATEGORY B

At the time of application, the candidate must have five years' experience in proposal development leadership positions that includes at least 15 of the 25 functions listed above. No college degree is required but candidates must have a high school/equivalent diploma.

How?

Initial certification will require the requisite experience described above and passing an examination. Training will not be required to take the examination but will be offered as an elective for preparing for it. Maintaining certification will require completing a prescribed course of continuing education every five years.

PPM EXAMINATION

APMP and their testing subcontractor, Shipley Associates, will develop the PPM examinations. There will be multiple examinations and a different examination will be given at each examination sitting. Each will be comprised of multiple choice, and possibly essay, questions.

Examinations will initially be scheduled for the APMP National Conference

in May and the Fall Symposium in September. They will be administered by Shipley Associates the day prior to the start of the National Conference and Fall Symposium.

EXAMINATION TRAINING

While no specific training is required in order to take the PPM examination,



candidates will be able to obtain training. Shipley Associates is developing a training course covering all topics on the exam. Once approved by the APMP Board, Shipley will be the designated vendor for training.

RECERTIFICATION

Certified PPMs will be required to recertify every five years by completing at least 75 hours of continuing education or instruction in proposal management-related subjects.

The details of this continuing education has yet to be worked out but it is

likely to be satisfied by activities such as: attending APMP conferences and symposia, chapter meetings and chapter-sponsored conferences; similar events put on by other professional associations; and, proposal management training courses and workshops.

Where?

Training, examinations, and continuing education workshops will initially be scheduled around the APMP spring and fall meetings. As the program matures, it is intended that at least the training and continuing education offerings be made locally to groups and chapters with a minimum number of attendees.

When?

The draft plan will be presented to the APMP Board of Directors in the near future and, when approved, implemented starting in 2002. Final approval will likely await determination of details such as the mechanics and cost of administering the program, finalizing the training curriculum, development of the continuing education requirements, and, last but certainly not least, the cost to APMP and certification candidates.

That's it in a nutshell. You'll be hearing more once the draft plan is presented to the Board, probably at the meeting in Albuquerque. A program guide is also being drafted and will probably be published on the Web site. I'll try to answer any questions that I can in the meantime (cschatte@mac.com). The APMP Board will have the final say on the program. They will welcome your input to this very important step in the Association's development.

Chris Schatte (cschatte@mac.com) is a proposal consultant based in Annapolis, MD. He is a member of the APMP Certification Committee developing the plan discussed in this article.

Missing Process...

Continued from page 1

capture to ensure they propose the RIGHT solution for a customer, competitors may try to force their stock solution to meet perceived customer needs. All other things being equal, which would you choose? Evaluators are human too!

Capture the Right Way

What is a proposal professional to do? Get involved in capture plans!

Companies need to think of each new business opportunity as a project puzzle. A team-oriented approach is most effective—looking at the whole effort from several perspectives with several sets of eyes and ears. We find there are

at least three levels within a customer's organization that must be accessed to help complete the puzzle: decision makers, influencers and functional/technical end users. It is usually not appropriate for a single person (i.e. business development manager) to gather information at all three levels. For example, a contractor's senior managers are a better fit for the decision makers and your technical experts for the technical end users. Find the right person with the right access!

Valuable information is gathered with each interaction between your company and a potential customer. You must have a useful method or system to assemble all of these information pieces to form your best puzzle solution. Unfortunately, some of the pieces appear similar and they tend to change over time. More access, more interaction and more

investigation lead to a clearer picture. Keep reviewing your pursue/no pursue or bid/no bid decisions so you don't waste resources on a lost cause.

Your capture process should provide answers to the following items before you start a proposal.

- Are we the incumbent or is the incumbent on our team?
- What is the incumbent's performance as viewed by the client?
- How well does the client know us and how well are we liked?
- How is our past performance on similar jobs viewed by the client?
- Have we given the client a demo?
- How do our key personnel compare to the competition?
- How do our other staff compare to the competition?
- If facilities are required, how do ours compare to the competition?
- How cost competitive can we be compared to the competition?
- Do we know what the right price should be?
- Do we have adequate people resources for the proposal?
- Do we have adequate time for the proposal?
- How prepared are we for the proposal compared to the competition?
- Do we know customer's mission, goals and dreams which become our Win Themes?

These are the items we look for in Capture Reviews. We discovered the list in the WinAward Opportunity Management and Bid Support System by Bayesian Systems.

The better your answers are to these questions, the better your probability of earning a contract award for real work. You don't necessarily need to be perfect, but you want to tell your oral or written story to an evaluation audience that is predisposed toward your company because they know and trust you. Then, you try to tell a better story than your competitors. After it is all over, learn something. Change the things that did not work well during capture so you and your company get better at it.

John Bender (jbender@acibiz.com) is based in Annandale, Virginia. He is Vice President of Advantage Consulting, Inc., a business development firm providing training, business tools and coaching to over 500 government contractors.

12th Annual APMP National Conference

May 22–25, 2001

Transitions...2001 A Proposal Odyssey

Albuquerque Convention Center

WHY NOT JOIN other members of APMP from around the U.S. at our National conference? The theme for the conference focuses on the transitions that are taking place in our profession as well as in our organization, APMP. More topics dealing with commercial proposals will be addressed. Our presenters will discuss both how to overcome challenges and how to win as an incumbent. The use of graphics, oral presentations and e-tools as aids in winning contracts will be evaluated.

Keynote Speakers will be:

David Pugh: Behavioral Differentiation – The Final Frontier

Tom Leech: Once More Into the Breech: Shakespeare's Insights for Winning Proposals

David Frank: Director, Centralized Acquisition Support team, Air Force Materiel Command Wright-Patterson Air Force Base, Ohio

For further information visit the Web site, www.apmp.org or call the APMP office 909-659-0789.

March Roundtable Synopsis

The speaker for the March Roundtable was Dr. Allan V. Burman who has extensive experience within the Government and as CEO of a consulting firm (Jefferson Solutions) in the area of Federal Acquisition Policies and

Procedures. Dr. Burman worked under Presidents Bush and Clinton in molding the revised Federal Acquisition System.

Dr. Burman told us that in the new acquisition environment, contracts are awarded to companies in which the government has the highest confidence. This is based primarily on those who have a strong past performance records. The technical approach and

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price are still significant, but to a lesser degree. He reported that prices within 20% of the lowest valid price are generally not a negative factor in the evaluation process. He indicated that the Government is looking for Performance Based Service Contracts that include metrics for measuring performance.

Some of the factors he mentioned that were positive to evaluators included: Team based / Value Based / Results Driven / Project Oriented / Relationship Focused programs. He indicated that the Government would continue to use contract vehicles that limit bidders

through pre-qualifications. Vehicles such as GSA, MOBIS and Task Order (IDIQ) contracts will become even more prevalent in the future.

Finally, Dr. Burman indicated that Government efficient acquisition methods will continue to increase under the Bush Administration. The days of Rule Based Acquisition and small discretionary power of Government buyers has passed and will not return. The new culture has not fully infiltrated all Government buying offices and it will be several years before it does. However, in the long run, the changes are here and here to stay.

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