

The Executive Summary

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*Association of Proposal Management Professionals

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Proposal Departments:

Whether to Use Permanent Staff or Consultants

BY RUSSELL SMITH

The position of the proposal department manager is similar to the position of a military general. Like the general, the proposal manager can never have enough troops or a good enough battle plan. For both the general



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and the proposal manager, the stakes are high, and there is a professional necessity to enlist every possible resource in attempting to win victory.

The key resource for the proposal manager is qualified personnel, and this article focuses on the question: What is the best way to staff a proposal operation? Every company that creates proposals faces the question:

Do we use permanent staff or do we outsource the proposal function, by using proposal consultants?

This question is especially important to Government contractors, because a large and expensive effort is usually required to prepare winning proposals. The question is often stated as follows: "What is the best way to invest our precious Bid & Proposal (B&P) dollars".

During the past 20 years, I have seen many companies facing this question. Their answers have ranged from keeping proposal preparation totally in house to outsourcing the entire proposal preparation process. Most companies fall in a spectrum between these two extremes and use a mix of in-house staff and consultants. So the question becomes, "What is the most cost-effective mix of permanent staff and proposal consultants?"

The decision on where to be within this spectrum depends on the following factors:

- (1) How large are the business development goals?
- (2) How even is the flow of RFP's being responded to?
- (3) What is the availability in-house personnel with the skills needed on the proposal teams?

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APMP National Capital Area (NCA) Chapter

P.O. Box 3063
McLean, VA 22103-3063

Web site:
<http://www.apmp-nca.org/>

NCA Board Members—2002

Lou Robinson

President
703-533-2102
win-pro@prodigy.net

Thomas E. Porter

Vice President/
Programs
703-345-7128
thomas.e.porter@trw.com

Betsy Blakney

Secretary/Treasurer
703-817-9700
b.blakney@datatrac-dc.com

NCA Directors at Large

John Bender

Director at Large
703-642-5153
jbender@acibiz.com

Dennis A. Doubroff

Director at Large/
Roundtable Coordinator
APMPdoubroff@aol.com

Kate Rosengreen

Director at Large/
Newsletter
703-876-1882
kmrosen@aol.com

Committee Members

Chris Schatte

Inter APMP Liason
cschatte@mac.com

Carl Dickson

Past President
703-898-4932
carl.dickson@proplibrary.com

Freelance Graphic Design

Ralph Scherer

ralph@schererMedia.com
703-753-0880

President's Corner by Lou Robinson

I recently wrote an article for *The River Runs*, the newsletter for the Cowpasture River Preservation Association. The Cowpasture River is in Highland, Bath and Alleghany Counties in Southwest Virginia where there has been a major drought. However, after I wrote this article, it began to rain and now after just a few weeks, the river is at a level close to normal. I took full credit for causing the drought relief.

So, what about this proposal drought that occurred during the last half of 2001? During this time the country was experiencing a weak economy, particularly in the technical sector. On top of this, the terrorist attack of September 11 further impacted the economy. During a time when few RFPs were on the street, the 9/11 event caused some of the few scheduled RFPs to be cancelled or delayed. It also caused a number of emergency procurements that were facilitated through abnormal processes, that is without the issuance of RFPs. Thus the number of RFPs was further diminished.

Like the water drought we had on the Cowpasture, the proposal drought is now seeing some relief. Some of the delayed RFPs are now appearing. Also, new budgets have been approved for all of the government departments / agen-

cies and they are beginning to spend some of this money.

My business, Winning Proposals, is sort of like the Cowpasture River in that the business level is almost in the normal range. I suspect that your proposal business (vendor, corporate or product) has also rebounded and is now reaching normal flow.

I believe the future for the proposal business also looks good. However, I think there will be changes and we must be ready for them. I predict that the proposal response times will continue to get shorter. This means there will be a need to focus on reusable proposal material. It also means that more up front work will need to be done based on draft RFPs and capture information.

When I wrote my article for *The River Runs*, I felt my article had a direct impact on how much rain fell and how much water flowed in the river. I also expect this article to cause more procurement action and more RFPs. This expectation has nothing to do with science, political influence or inside knowledge. It is just a special magic that I believe in. So remember as you are rushing to the bank over the next few months, that this article influenced your success.

Magic is wonderful!

—Lou Robinson



The slate was elected unanimously as per the ballot.

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1. John Bender

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4. Vacancy exists

The board welcomes applicants for this position.

May Roundtable

“The Mouse That Soared” and Bingo, Too!! Don’t Miss This One!

On May 15th, APMP/NCA will feature a presentation by Tom Harmon of Boeing Autometric on their Opportunity Gate Process.

When an Information Technology “mouse” was acquired by a Defense & Aerospace “elephant,” it soon became apparent that they needed a common understanding of long-term business development goals and strategic performance measures. The mouse was assigned to revise its life cycle pursuit processes. Would the outcome be purely administrative or was this a chance to build a meaningful bridge between two cultures?

Using a TQM approach, the mouse team combined industry best practices in the elephant’s framework to incrementally achieve a practical, easily adaptable Opportunity Gate Process. As with any significant change, not everything was straightforward. The mouse spent more than a year making the new process work in-house, and along the way attained ISO9001 certification. The elephant liked what it saw and is deploying the mouse’s system to its other business units.

Was the mouse really a baby elephant?

In a fast paced overview, Tom Harmon will describe how the mouse team developed and continues to improve the Opportunity Gate Process at Boeing Autometric, Incorporated. The Springfield, Virginia firm provides innovative system solutions for national security and tactical operations. Tom will describe the mouse team’s philosophy, insider secrets, tips, lessons, and some pragmatic recommendations for your own enterprise’s genuine success with dynamic business opportunity management.

Boeing Autometric mouse team members will attend to answer your questions and comments. The team will also host a “Bid & Proposal Bingo” event with prizes.

Calendar of Events

| | | | |
|------|----|------------------------|--------------------------------------|
| MAY | 7 | APMP-NCA Board Meeting | • Teleconference |
| | 15 | APMP-NCA Roundtable | • Tom Harmon, The Mouse That Soared! |
| JUNE | 2 | APMP-NCA Board Meeting | • Held at Advantage Consulting |

“Did he say ‘prizes’?” Yes, I did! “Did he say ‘bingo’?” Yes, I did! And, no, I don’t know how it will work, but I don’t think we’re talking “B-7” and “G-58” here. Like I said – you don’t want to miss this!!

The Speaker

Tom Harmon is a Department Head at the Boeing Autometric Proposal Center. He manages Boeing Autometric day-to-day proposal activities, including competitive analyses, proposal team operations and development of infrastructures to support team based strategic pursuits.

Boeing acquired Autometric in August 2000, and Mr. Harmon has been directly engaged in the ongoing transformation of bid and proposal management systems and processes to incorporate the best practices of both organizations. Autometric earned formal ISO9002 certification in September 2001 for the Opportunity Gate Process, a hybrid method of managing large numbers of annual pursuits, developed by Mr. Harmon’s team. This easily tailored system was then adopted by the parent division, and is being applied to eight additional Boeing business units in 2002.

Mr. Harmon was employed from 1981 to 1996 by EG&G Washington Analytical Services Center, Inc. as a logistician and financial manager supporting major U.S. Navy acquisition program offices. Mr. Harmon learned proposal management the old fashioned way, taking on progressively responsible proposal assignments on 18 winning EG&G proposal efforts (awards ranging from \$40M to \$1.5B).

Before his civilian career, Mr. Harmon served 10 years in the U.S. Navy as a gun fire control technician stationed on warships in Yokosuka, Japan from 1972 to 1976, and on Pearl Harbor-based fast attack submarines from 1978 to 1981.

Who May Attend?

Anyone interested in the topic is invited to attend. You do not have to be an APMP member to attend an NCA roundtable. You don’t even have to be a proposal specialist. If you are interested in proposals, business development, or are looking for networking and professional development opportunities, we’d like for you to join us!

Please refer anyone else in your organization that might be interested and encourage them to attend.

Location, Agenda, Cost and Further Info:

Please see the announcement posted at http://mediausa.net/apmp/may_announcement.html

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

Ten Good Reasons to Use Passive Voice

BY RICH FREEMAN

To many writers, passive voice “just sounds better.” Our news media and our politicians are adroit users of passive voice. The most frequent user and abuser of passive voice is our government. Many writers believe that because the government uses passive voice, we should respond in passive voice. Others argue that a proposal was never lost because of passive voice, nor won because of active.

Good writers know that inappropriate or over use of passive voice produces a weak proposal. Active voice presents a stronger argument, is much clearer about who does what, uses fewer words to say the same thing, and is much more direct and believable. On the other hand, passive voice (used sparingly and skillfully) can get you out of trouble, and make things sound smoother. There are other reasons to use passive voice. In fact, there are ten ways to use passive voice effectively in writing proposals.

1. To avoid using the word “one” as the subject
2. To avoid sexist writing and the he/she trap
3. To emphasize someone’s importance
4. To avoid pointing the finger at someone
5. When the identity of the person taking the action is irrelevant and



you want a smooth-sounding sentence.

6. When you want to quietly brag about someone
7. When the identity of the actor is unknown
8. When you want to avoid being too directive
9. When you don’t want to say who is going to take the action
10. When you want to soften and smooth, or vary the pace

The following 10 examples demonstrate effective use of passive voice.

1. Get rid of the word “one” as the subject.

There will be times when one prefers the second approach to a technical evaluation.

There will be times when the second approach to a technical evaluation is preferred.

2. Get rid of the he/she trap

The candidate must file his/her non-disclosure agreement within ten

days.

The non-disclosure agreement must be filed within ten days.

3. Emphasize someone’s importance or accomplishment

ProCorp’s John Ebert completed the project on schedule

The project was completed on schedule by ProCorp’s John Ebert

4. Avoid finger pointing

Our field office missed only one deadline.

Only one deadline was missed.

5. When the identity of the person taking the action is repetitive, obvious, or irrelevant and you want a smooth-sounding sentence.

ProCorp was incorporated in 1972. It established its equal opportunity policy in 1973.

ProCorp was incorporated in 1972. Our equal opportunity policy was estab-

Highlights of the March Roundtable

On March 20, Rob Ransone presented a briefing on *The Running Start Continuum*, at the bi-monthly Roundtable of the APMP NCA chapter. He gave a quick history of the classic storyboard process, highlighting its limitations in today’s near-paperless world. As a communications tool, the storyboard has been the focal point for face-to-face iterative reviews of individual sections by the core team, as well as overall health checks of the total proposal.

Rob presented the *Running Start* as a conceptual process that applies the storyboard philosophy to modern tools in a manner that provides a smooth transition from early strategizing and customer requirements through the early planning,

into initial drafts and on into production of the final proposal. He also demonstrated a tool that employs the concept. Rob is the president of Ransone Associates, and provides proposal consulting and automated process software development.

Also presented at the Roundtable was a brief introduction to the Proposal Industry Council by Mr. Joe Nocerino, one of its founding members. The PIC is a recently-formed association of companies providing proposal consulting services, primarily to private industry firms. They provide a non-competitive forum for discussing issues faced in the operational management of its member organizations, and would welcome the participation of other such groups. For information, information, please contact Joe at 703-790-0140 or jtn@centuryplanning.com.

lished in 1973.

6. When you want to brag about someone a bit more quietly.

John Simmons, our Program Manager, won the performance award three years in succession.

The performance award was won three years in succession by our Program Manager, John Simmons.

7. When the identity of the actor is unknown

Someone at the field office submitted the contract amendments on July 13.

The contract amendments were submitted on July 13th.

8. To soften and not be too directive

The Agency must approve the new release date before we can take action.

The new release date must be approved before we can take action.

9. When you don't want to say who is going to take the action

The Contract Manager, the Program Manager, or the Office Manager will review and approve the updated task plan within five business days.

The updated task plan will be reviewed and approved within five business days.

10. When you want to soften and smooth, or vary the pace

ProCorp delivered the initial program plan on October 23—14 days before the required deadline. We accelerated the staff transfers and completed the personnel transition before the second review. Our Human Resources Department completed all of the transition tasks by December 14—nearly six weeks ahead of schedule.

ProCorp delivered the initial program plan on October 23—14 days before the required deadline. The Human Resources Department accelerated the staff transfers and completed the personnel transition before the second review. All of the transition tasks were completed by December 14—nearly six weeks ahead of schedule.

Lesson Learned—Passive Voice and the Grammar Checker

The greatest argument against using
Continued on page 8

MARK YOUR CALENDARS

2002 Roundtable Schedule

– **May 7–10** –

National Conference

Salt Lake City, UT

– **May 15** –

– **July 17** –

– **September 10** –

– **November 20** –

These dates have been selected for the Roundtable events for 2002 calendar year. While we make every effort to keep our schedule predictable, unforeseen circumstances do sometimes arise which necessitate us to reschedule. Check the NCA Web site www.apmp-nca.org and our newsletter for updates on changes for these upcoming events.

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Proposal Departments

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(4) How does the cost of in-house personnel compare to the cost of consultant personnel?

Business Development Goals

It comes as no surprise that, the more aggressive the business development goals are, the greater is the need to outsource. If a company has large growth goals – say 40 - 50% growth or more — it is usually not possible to handle the workload in a successful manner by staffing up internally. At least not in the short run. Conversely, companies with more modest development goals have a better chance of meeting goals with in-house staffing.

Let's assume that the goal is to develop \$40 million in new business during the next year. Let's further assume that we have a 50% win rate and that we usually bid on contracts either in the \$5-\$10 million range or in the \$20-\$30 million range. Then arithmetic tells how many bids we will need to prepare, and our recent experience helps us estimate the quantity of skills and hours needed to get the work done.

Evenness of Proposal flow

Although business development goals help define the quantity of effort needed to get the bids prepared, the granularity of the bids is even more important in determining how much proposal work the company will outsource and how much they will keep in-house. A company bidding a large number of smaller contracts may be able to spread the effort so that they can handle all of their proposals in house. In contrast, a company bidding a few large programs, with gaps of inactivity between bids, can usually get the work done more economically using proposal consultants.

My experience has been that very few firms experience an even flow of proposal activities, and the more common situation is to have peaks and valleys in the workload. Usually the only firms experiencing an even flow in workload are those that submit a large number of proposals for relatively small contracts. For companies bidding for large con-

tracts, life in the proposal shop typically is a constant round of peak and valley situations.

For many companies, the issue of whether to outsource or not and if so how much is not clear-cut. Given the uncertainty of RFP releases, for example, it is impossible to predict the timing of proposal efforts. Consequently, good luck in the release schedules may mean an evenly spaced workload that the in-house staff can handle well. However, when too many bids stack up at the same time, due to simultaneous release dates, the only solution may be to outsource.

Availability of Skills Needed for the Proposals

Most firms maintain a group of full-time proposal process professionals. Typically, they augment the proposal staff with technical talent drawn from other in-house groups as needed to develop the technical solutions being proposed. And they then augment the need for proposal process or technical personnel with consultants when the in-house resources are exhausted. The proposal process personnel typically include proposal managers, technical writers, coordinators, desktoppers, pricers, and the like. Those assisting with technical proposal often are system engineers, network engineers, and other similar personnel who are matrixed to a proposal effort as needed. The outside consultants can include proposal process personnel, technical personnel, or assorted specialists.

The more manageable problem for the proposal group is that of assigning the proposal process talent, because those personnel are usually under the direct control of the proposal group manager. The more difficult problem is the technical talent needed for the solution. These personnel often have conflicting loyalties. For example, they are frequently directly billable personnel working on a government site during the day. Consequently, they contribute to the proposal, in worst case situations, after hours during the evenings and on weekends. A somewhat better situation is that in which the tech solution talent is

just matrixed to multiple proposals but supports the proposal work during normal business hours.

Proposal consulting groups can frequently provide the best available solution to companies needing additional talent or specialty talent. Nearly all proposal consulting firms have a ready source of proposal process talent such as proposal managers, tech writers, coordinators, desktoppers, pricers, and the like that can be provided with a day or two of lead time. Some consulting firms with large databases can readily provide highly focused specialists such as an expert in a system, an agency, a process, or a program given a week or so of lead time.

Relative Cost of In-House Personnel vs. Consultants

The question asking, what is the cost to the company to use in-house vs. consultant personnel to prepare the proposals, is complex and challenging to answer. It has been my experience that, even high-level decision-makers in big business firms often do not understand this question. For example, the cost to employ a full-time staff member must take into account the total cost to employ. And the total cost to employ includes not only salary and fringe benefits, but also variables such as cost of down time on the job and cost to replace employees. Likewise, the cost of using consultants must take into consideration the fact that the consultant does not arrive with a depth of knowledge on the company.

Some of the cost advantages of using consultants to prepare the proposals are as follows:

- The company can bring in the consultant on an as-needed basis and then release him or her when the task is done with no loss of productivity due to down time.
- The company can obtain highly specialized marketing or technical talent from the spot market without having to incur an inordinate overhead cost.
- The company can readily expand and contract the proposal teams as needed to meet typical peak and valley situations for an affordable price.

- The company can get a more precise match between personnel skills and task requirements than would ever be possible using only in-house talent.

Typical cost advantages of using in-house personnel to prepare the proposals are listed below:

- The skills developed in preparing the proposals enrich the company by staying in house rather than leaving the company when the consultant departs.
- There is no learning curve required for the employee to come up to speed on knowledge of how the company does business.
- There is reduced risk that there will be losses due to leakage of proprietary information from the company.
- The capability to utilize employee overtime in proposal preparation helps keep the cost down, at least in the short run.

During the past two decades, we have been in a position to see how scores of companies manage their proposal preparation operations. Based on that

experience, we offer the guidelines shown below.

Largely Permanent Staff Solutions

The situations shown below make it advantageous for a company to use permanent staff for proposal development:

Bids are highly granular, and it is easy to maintain a steady-state proposal preparation operation.

The company has valuable trade secrets that might be compromised by using consultant personnel.

Business development goals are modest, and the in-house approach used in the past is satisfactory.

Largely Outsourced Solutions

The situations shown below support the outsourced approach to staffing the proposal operation:

The company typically bids substantial programs, producing a peak-and-valley workload in proposal preparation.

The company is bidding programs in

which the specialized expertise needed to win the contract is not available inhouse.

The company wishes to make a large and dramatic increase in the volume of contract wins.

Several companies are forming a team to bid a large and complex program.

Selecting the Best Proposal Consultant Group

The problem of selecting the most effective proposal consultant group is critical, considering the costs involved and the possibility of gaining a competitive advantage to win more contracts. An optimal selection of a proposal consulting group can make a real impact on the company's bottom line through increased contract wins for an affordable price. Following below are some of the factors involved in making the most effective selection:

Quality — The consultant group selected needs to have an excellent track record in providing the desired service, whether that service is a Coordinator to work for a month or a proposal team of

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20 to prepare the winning bid for a telecommunications program.

Cost—The consultant group should be able to deliver the desired service for a price that is competitive.

Depth—The consultant group needs to have a sufficient quantity of qualified personnel in the skill categories needed to meet the anticipated requirements.

Reputation—The consultant group should have a demonstrated record for providing responsive service and solving problems as necessary to complete tasks like the customer needs in accordance with expectations.

Process—The consultant group must have the capability to either use the customer's proposal preparation process or to provide a proposal preparation process that is sufficiently robust and repeatable to handle the anticipated work assignments.

Name Brand—Some firms feel most comfortable in selecting a proposal consultant group with a well-known national name, and they usually pay a premium of 30–40% over the cost of a local firm for the prestige of the brand name.

Personality—Service delivery works best when the company has succeeded in selecting a consultant group that is not only technically qualified, but that also has a corporate culture and personnel who are highly compatible with the customer's own culture and personnel.

Conclusion

The question as to how much and what proposal service to outsource and what to keep inhouse is a never-ending problem. It sometimes seems that, if a company has been doing proposals inhouse for the past 5 years, they will be outsourcing the next 5 years, and vice versa. Although some situations are clear-cut, making a decision is often as much of an art as a science, and it depends heavily on a company's business development strategy. Since simplification in contracting, most companies have moved more toward the outsourcing solution.

However, nearly all the federal bidders we have seen maintain some type of a permanent proposal staff. In the case of

those firms bidding large opportunities very infrequently, the permanent staff may be just a part-time coordinator. A more common behavior is for a firm to maintain at least the staff needed to pursue one proposal at any given time. This typically includes at minimum a proposal manager, technical writer, editor, and combined coordinator/desktop publisher/graphic artist. A few robust divisions of Fortune firms still maintain large departments with thirty or forty or more permanent personnel.

During the past two decades, we have had some prospects that outsourced very little proposal work. They chose NOT to outsource, because they believed they could achieve their goals with only permanent staff. Many of those companies could have grown faster and could have achieved greater profits by using outside assistance to bid, and win, additional programs.

Russell Smith is the President of Organizational Communications, Inc. (OCI) a proposal consulting firm located in Reston, Virginia. Smith has been with OCI for 18 years. He can be contacted at rsmith@orgcom.com

Ten Good Reasons to Use Passive Voice ▼

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grammar checking in the proposal industry seems to be the bother of being prompted again, and again about use of passive voice.

If you have ever gone through a grammar check and the passive voice feature is active, you know that the algorithm makes frequent stops. This is not due to a program error—the program is Six Sigma correct—it is because we have taught ourselves to use the passive voice when we are writing about important things. It is the wrong way to write proposals... at least winning proposals. So, set your grammar checker to CHECK PASSIVE VOICE and use it religiously.

You Be the Judge

RFP REQUIREMENT

The Endurance Test shall be conducted as specified below, and shall not be started until the Government approves PVT-2, training has been completed, and all outstanding deficiencies have been

corrected. The Contractor shall provide personnel to monitor the test 24 hours per day, including weekends and holidays, during the 30-day endurance test. No repairs to equipment will be made during this period. The testing may be terminated at any time the system fails to perform.

PASSIVE RESPONSE (97 WORDS)

Endurance Testing will be conducted after Government approval of PVT-2. In addition, site training of all System Administration and Operations Personnel will be completed by our training staff, and all deficiencies will be corrected by our field engineering staff. The test will be monitored by the ProCorp team consisting of a Test Monitor Supervisor and three field test engineers. The testing will be monitored 24 hours per day, including weekends and holidays, during the entire 30-day endurance test by four shifts of teams. No repairs to equipment will be made by our teams during the testing period.

ACTIVE RESPONSE (88 WORDS) ±10% SAVINGS, OR 10 PAGES IN 100.

We will conduct Endurance Testing after the Government approves PVT-2. In addition, our training staff will complete site training of all Systems Administration and Operations Personnel, and our field engineering staff will correct all deficiencies. ProCorp's monitoring team consists of a Test Monitor Supervisor and three field test engineers. Four shifts of these teams will monitor the testing 24 hours per day, seven days a week (including weekends and holidays) during the entire 30-day endurance test. Our teams will not make repairs to equipment during the testing period.

Rich Freeman, is a proposal consultant, an English major, and one of the founders of the APMP Professional Journal. Besides managing and writing proposals, he has written television, radio, newspaper and magazine ad copy and numerous articles for a wide range of publications.