

The Executive Summary

VOL VIII NO. 3 JULY/AUGUST 2002



A BIMONTHLY PUBLICATION OF THE APMP* NATIONAL CAPITAL AREA (NCA) CHAPTER

*Association of Proposal Management Professionals

Pre-RFP Release Planning: Pay Now or Pay Later

BY BRUCE DENORMANDIE

Just about anyone in this business will tell you that Pre-RFP release planning is critical to the success of any bid. Then, why is it that many companies fail to invest adequately in this important phase of an acquisition?

All of a sudden the RFP these companies have been waiting for is released and all the people responsible go into a



IN THIS ISSUE

- 1 Pre-RFP Release Planning: Pay Now or Pay Later
- 2 President's Corner
- 3 June Roundtable
- 4 What Evaluators Think as They Read Your Proposals
- 4 Boeing Autometric Team Presents at APMP Roundtable

full court press trying to get the bid out on-time. Are they smaller companies without the resources to spend on planning? Does this apply to larger companies dependent upon the sales and marketing departments to provide early efforts; but get caught up in the short term revenue chase so prevalent in today's myopic business demands?

Either way, if your win rate is low (I would suggest below 30%) you may not be focusing enough on the assessment phase. I have personally observed that win rates in the high eighties (%) are quite possible. This is achievable if your capture team is well-established in advance and performs proper assessment and planning. A sound capture plan focuses on maintaining a high touch customer relationship and strategic product or service positioning. As proposal managers, you also need to

consider initiating early baseline designs, preliminary work breakdown structures (WBS) and mapping out a proposal development schedule. This helps to expose critical resource shortfalls in advance.

What other critical work can be done ahead of time to improve win rates and drive revenue? If you have ever attended a lecture or read anything on "Quality," you will recognize the consequences of failing to incorporate quality into your proposal response. This avoids the need to respond to pages of Clarification Requests (CR) and Deficiency Requests (DR) or expend excess resources in overtime or weekend work getting the RFP out the door. This planning work can be done through a number of measures which can be established well in advance of receiving the actual RFP.

Continued on page 6

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

Tom Harmon
Director at Large
tharmon@autometric.com

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

Committee Members

Russell Smith
Membership
rsmith@orgcom.com

Freelance Graphic Design

Ralph Scherer
ralph@schererMedia.com
703-753-0880

President's Corner by Lou Robinson

THE PROPOSAL SEASON

I have been involved in proposals for about thirty years. During this entire time (especially since I started Winning Proposals) I have tried to determine what the annual proposal cycle looks like and what factors affect this cycle. If I know when the proposals are coming, I can make business and personal plans that allow me to maximize the business for the least cost while also allowing the best personal life including exotic vacations.

This idea was so compelling to me that I began plotting the proposal activity on a monthly basis. I went through this exercise for about five years in the hope that I could determine trends and establish seasons of high and low proposal activities. The conclusion I have drawn after all of this investigation is that there is absolutely no proposal cycle that is repeatable from year to year.

This conclusion was reinforced during the June meeting of the Proposal Industry Council (PIC). This is a group of owners of companies offering support for proposal development and production. The members of this group (including myself) are intensely interested in proposal cycles. We went around the table and all agreed that there were no repeatable trends. We further speculated on what factors are at play and why they result in the random behavior of the active procurements requiring proposals.

Russell Smith of OCI suggested that any one person (or small company) gets only a micro view of what is really happening. It is sort of like analyzing a bucket of ocean water and then relating the results to all portions of the ocean. Generally we are only analyzing IT and telecommunication proposals that have interest to each of our favorite clients. So, the big picture of all proposals of all types may be quite different than those each of us focuses on.

However, it is generally accepted that all proposal activity was far below normal in all segments during the last half of 2001. On this subject, Russell Smith suggested (what a smart guy) that this was caused by the change in adminis-

tration and further by the slowness in filling the Presidential appointed positions. Also, approved budgets for all Government Agencies and Departments were slow in being established during this time.

A great deal gets blamed on the 9-11 terrorist attack. While this did impact Government buying by causing many emergency procurements and few normal (RFP/Proposal/Contract) type procurements, the slowdown in our industry can not primarily be attributed to that event. We were already at a very low point in proposal activity and so the overall impact was not overwhelming.

Throughout all of this, we all have remained eternal optimists. During the PIC meetings each month, each person offers predictions on how good business will be in the future. At every PIC meeting, the conclusion is always that business will be much better within 60 days. This is the only repeatable element I have discovered in this mumbo jumbo business of predicting proposal activity.

The good news is that business has been good for all PIC companies over the last several months. None of us are quite sure why and most of us have given up on trying to figure it out. We are just happy that things are better now and hope it stays that way. Finally, all at the last PIC meeting were very sure that things will be much better in 60 days.

—Lou Robinson

2002 Roundtable Schedule UPDATE!

The previously scheduled date of September 10 has been changed to **September 18.**

Please make the change in your schedule.

Roundtable Announcement

Improve your win rate with effective Capture Planning.

On July 17, APMP/NCA will feature a presentation by Steve Leonard of Decision Coaches, Inc., on "Taking Charge of Capture Planning."

All too often, Capture Planning is not institutionalized as part of an integrated business acquisition process. The result often is a proposal team that takes the heat late in the process as the deadline approaches because upstream planning was inadequate. As much as companies have focused on defining business processes, why does this phenomenon still persist? What are the hurdles to overcome to improve this situation?

Believe it or not, the problem is similar to thermodynamics and the answer can seem just as difficult! But techniques exist today to improve the front end planning and proactively take charge of winning business. The goal is to leverage the organization's collective knowledge, sort through the early chaos and uncertainty, and reveal via prioritization, the critical success factors. Companies can take charge of their probability of winning and thanks to state-of-the-art techniques, they need not bone up on thermodynamics!

Why do we emphasize the need to do effective Capture Planning early on? Sun Tzu knew:

"Plan for what is difficult while it is easy, do what is great while it is small. The difficult things in this world must be done while they are easy, the greatest things in the world must be done while they are still small. For this reason sages never do what is great, and this is why they achieve greatness."

—Sun Tzu, Chinese General, *The Art of War*, 400 BC

The Speaker

Steve Leonard is the Vice-President of Sales and Marketing at Decision Coaches, Inc, a company that specializes in capture planning and complex decision-making.

Prior to that Steve served as the Worldwide Strategic Marketing Manager at IBM's \$6B Microelectronics Division. In that capacity Steve was responsible for deploying rigorous marketing practices, conducting market intelligence, and establishing a process for market selection at a time when IBM Microelectronics was transitioning from a captive supplier to full-fledged merchant market player. Before this assignment Steve spent 15 years at IBM in various management roles including Product Marketing, Segment Marketing, Business Partner Acquisition, System Sales, and Finance.

Steve has a BS in Mechanical Engineering and an MBA from Penn State University.

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:

Tyson's Corner Holiday Inn on International Drive in McLean, Virginia

Agenda:

5:30pm Networking

6:30pm Buffet Dinner

7:15pm Announcements, Featured Presentation

Cost: \$35 — Payment received in advance,
\$55 — Pay at the door.

IF YOU PLAN TO ATTEND...

Please RSVP to Dennis Doubroff via email at apmpdoubroff@aol.com and mail your check to: APMP-NCA, PO Box 3063, McLean, VA 22103-3063.

To confirm attendance, checks must be postmarked by Friday, July 12.

Calendar of Events

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

For information on board activities or to become involved call Lou Robinson at 703-533-2102.

JULY	2	APMP-NCA Board Meeting	• Teleconference
	17	APMP-NCA Roundtable	• Steve Leonard, Taking Charge of Capture Planning
AUGUST	6	APMP-NCA Board Meeting	• Held at Advantage Consulting

What Evaluators Think as They Read Your Proposals

I recently read the results of a survey of government proposal evaluators conducted a few years back. The purpose of the study, called “The Evaluator Preference Survey”, was to discover what experienced proposal evaluators liked and didn’t like in proposals, and how they made decisions. The survey was directed at DoD and NASA evaluators, but my experience tells me that the results are pretty much the same for all evaluators. Here are some highlights:

Evaluators love **summaries**, and think they are extremely important to a winning proposal. Summaries tell the readers what they are about to see, which makes readers better prepared for the message. All the respondents said they read summaries first before going onto the detail. Some read only the summaries at the beginning sections they weren’t interested in or tasked with scoring.

This makes the summary-of any section-the ideal place to plant the seeds of your strategic messages-your themes.

Evaluators like **cross reference matrices** that show where the RFP requirements are addressed in your proposal. For large proposals responding to complex RFPs this is a must. Evaluators like being able to scan the matrix for their topics of interest and find exactly where they will find it addressed in the proposal.

This saves time. It also indicates that you have done a thorough job.

Evaluators like a **well-organized and consistent proposal**. This goes beyond simply following the RFP outline. This means that subsections are well organized and consistent throughout the proposal. A systematic, well-prepared

proposal indicates that the supplier will be orderly, thorough and effective on the contract.

Evaluators don’t care for **alternate proposals**. This signals to evaluators that the supplier is not really prepared to meet the requirements the customer has made. The evaluators surveyed said they didn’t read alternate proposals thoroughly, if at all.

Of course, if the customer has specifically asked for an alternative to the solution called out in the RFP, then by



all means, supply one. But for the most part, if you have waited until you write the proposal to give an alternative solution, then you are way too late. Do it sooner, months before the RFP drops.

Evaluators like to see **contract deliverable items**. In other words, what will you produce as a result of the work you do? Detailing the deliverables tells evaluators that you know the full scope of the contract; it gives them the warm fuzzy that you have it under control.

Many federal government RFPs require this information (check out the Contracts Data Requirements List-CDRLs). Many customers both in and out of government don’t, however, and including the contract deliverables tells

the evaluators that you know exactly what the contract requires and what you’re on the hook to deliver.

When it comes to **resumes**, here’s what the study showed evaluators found important (in decreasing order):

- Experience
- Education
- Publications
- Patents
- Professional affiliations

Evaluators found **backup material** valuable and useful. By back-up material they mean technical data not specifically called out in the proposal but that supports your case. Not many thought marketing literature was very helpful.

But the material needs to go in the back of the proposal; don’t try to wedge it into the proposal if it doesn’t fit either the format or the context.

And here’s what evaluators found most irritating (in decreasing order of importance):

1. Proposals that are too wordy
2. Poor proposal quality—washed out or all b/w graphics, spelling errors and typos, poor quality copying, etc.
3. Poor response to RFP requirements
4. Poor approach to resolving the problem
5. Inherent deficiencies—missed requirements here and there, inaccuracy of data, etc.

Note: that the top two most important irritants have more to do with the readability of the proposal rather than the content.

These results won’t tell you how to write winning proposals; all they do is give you an idea of what a small slice of people think is important in proposals. Think of them as pointers to making better proposal decisions in the future.

Dan Safford is a senior proposal consultant for P.S. Associates with nearly 20 years experience managing proposals. He is an author, trainer and management consultant speaking widely on proposal related issues. Dan is based in Seattle, Washington and can be contacted at www.psassociates.com or 206-463-6827.

Boeing Autometric Team Presents at APMP Roundtable

On May 15th, 2002, Autometric's Plans & Proposals team delivered an informative presentation to 35 members of the National Capital Area Chapter of the American Proposal Management Professionals (APMP). With Bill Dowling operating PowerPoint displays, Tom Harmon delivered the keynote speech, "The Mouse That Soared and Bingo, Too!" After the speech, Chris Johnston and Rob Porter joined Bill and Tom in providing a panel discussion to respond to questions and comments.

To keep things lively, Chris and Bill passed out "Bid & Proposal Bingo" cards with proposal jargon in the play spaces. Attendees marked off any "buzz words" they heard, and at "bingo" they were permitted to select one of several door prizes. The grand prize was a rugged Boeing portfolio, and everyone received a Boeing Autometric Frisbee. The lecture and panel described innovative ISO9001-complaint opportunity gate process concepts developed and implemented by Plans & Proposals during the Boeing Autometric transition period. It is unusual for business development organizations to seek ISO certification, and the APMP members showed great interest in the topic. In 2000 and 2001, Autometric was undergoing ISO9001 Certification, which required a single, repeatable process for managing competitive bids.

Meanwhile, Autometric was adapting Boeing's long-term business development methods and strategic performance measures. New project goals were set, a different way of budgeting was required, and a new set of corporate resources was available. Tom calls the impact of these changes, "the acquisition factor."

The eventual solution was a Boeing gates process reflecting proven Autometric business philosophies, constructed to address ISO requirements. In a year long effort, former plans & proposals staff member Susan Palma kept SBU proposal managers "in the loop," incrementally incorporating their feedback and practical suggestions into the official procedures being documented by the ISO implementation team.

Tom said, "We implemented a hybrid gate process to adopt traditional Boeing concepts while building a bridge to bring Autometric and Boeing together." The team came up with the *We Gates* training program in 2001, combining best of the "old" practices and the "new" gate concepts. In 2002, Integrated Defense Systems tasked Sharon Francisco and Rob Porter to help tailor the hybrid concept for use by other Boeing business units.

The event's primary message was focused on describing the features, benefits and lessons of ISO9001 certification. In response to a question during the panel discussion, Rob Porter said, "At Autometric we believe the capture and proposal activity are a normal, integral part of the whole business enterprise, and critical to customer satisfaction. We felt we should be part of the ISO certification, not left out, and be fully accountable for enforcing minimum standards for every competitive pursuit."

So, why the unusual "Mouse That Soared" theme? Tom explained, "We told our story from the perspective of a mouse facing an elephant, which was how we felt in August, 2000, when Autometric was acquired by Boeing Space and Communications. After any acquisition there are changes that need to be made, and it is a total team challenge to attain win-win results without being intimidated. We succeeded and eventually became a baby elephant." The theme lent itself to some original artwork drawn by Bill Dowling that elicited kudos from the audience.



The Board is proud to announce two members have accepted positions on the APMP-NCA committee. Mr. **Tom Harmon** of Autometric was elected to the position of Director at

Large. Mr. **Russell Smith** was appointed as Chair of the Membership committee. We welcome these two talented individuals to our team!

MARK YOUR CALENDARS

2002 Roundtable Schedule

– July 17 –

– September 18 –

– 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.

Proposal Departments ▼

... Continued from page 1

The availability of the following components will significantly reduce delays and enhance your final product.

- Identify account-facing resources already working for the customer. This ensures that critical information relevant to the account is captured and incorporated into your proposal. All too often once an RFP development phase has commenced the account team with the knowledge to personalize your proposal has moved on to another business opportunity.
- Research your customer so you can speak to their strategic plan. The knowledge of how the piece of business you are bidding on fits within the broader scheme of a customer's operation is invaluable. Your response can then be cast, not just in the light of the technical requirements of the bid, but also in the context of the management and strategic directions of the organization.

- If you have an idea of the customer's need in advance, enlist the support of other departments such as, engineering or those who will be developing your solution. This can place you ahead of the power curve, especially if the turnaround time is a short one.
- Commence discussions early with any third parties you require as part of the solution. This enables you to integrate their input as soon as possible. Who wants to still be in negotiation on a Statement of Work with subcontractors as you are delivering your proposal? This avoids excessive delivery and cost risks.

There are many other aspects of the acquisition process that can be identified early in the game. These are just a few that I consider to be key factors. Hopefully all this will have taken place and your company can spend the time needed on analyzing competitive information and establishing the right winning price scenarios.

Bruce DeNormandie has 15 years experience providing IT Proposal and Capture Management proposals to the Federal Government and over 30 years of providing a wide range of IT services. He provides an independent proposal consultancy based in Reston, Virginia. He can be contacted via e-mail at DeNormandie@comcast.net or telephone at 703-901-8576.

Check out our New Web Site!

Update your e-mail address at
our new look Web site:

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

The articles presented in this newsletter are for information purposes only. APMP-NCA does not endorse or promote this or any other product in any way.


PROPOSAL HELP from RANSONE ASSOCIATES

Proposals Organized to Win 2000™

We can shred out your RFPs with POW2000 and Running Start™!

- ★ RunningStart is an author-friendly MS Word file that provides a smooth continuum of RFP requirements, strategies, Storyboards, proposal draft
- ★ RunningStart formats are easily customized to your specific needs
- ★ RunningStart eliminates the "blank sheet, start and stop" frustrations of Storyboards, is easily distributed, written, reviewed, and approved online

From our office — No travel expenses — Fixed price

 Ransone Associates, Inc.
P. O. Box 425
Wicomico Church VA 22579

Call: (804) 580-5929
E-mail: Ransone@aol.com
Website: www.ransone.com

Background photographs courtesy of NASA and STScI website: <http://oposite.stsci.edu/pubinfo/pictures.html>



Membership

Application

APMP Federal Tax I.D. Number:
870469987

P.O. Box 668 • Dana Point, CA • 92629-0668 • Phone: (909) 659-0789
(Annual Fee \$75 – Submit with application, make check payable to APMP)

First Name Initial Last Name Membership Number (leave blank if new)

Position Title Company

Company Address City State Zip Code Mail Code Daytime Phone

E-Mail Address Area Code/Fax number

Home Address City State Zip Code Area Code/Telephone

Signature Referred for Membership By Date

Please indicate if you would like to affiliate with a local chapter. Yes No

Please indicate type of membership. New Renewal

Please indicate your official APMP mailing address. Business Home

Method of Payment: Check Visa MasterCard AMEX

Card# _____

Exp. Date _____

Please check the appropriate box

Primary Function

- Business Devel./Acquisition
- Program Manager
- Proposal Consultant
- Proposal Manager
- Proposal Specialist
- Strategic Planning
- Other _____

Company/Organization's

- Service or Product**
- Aircraft (Commercial)
- Computer
- Electronic/Precision Instr.
- Engineering Services
- Financial Services
- General Services
- Health Services
- Information System Services
- Systems Integrator
- Telecommunications
- Other _____

Employer

- Commercial
- Aerospace/Defense
- Federal
- Government
- Non-profit

Proposal Production



24 Hour Company provides
around the clock support with responsive,
flexible and dependable production teams.

Let us help you **create winning proposals** through enhanced
visual communications and timely drafting to aid your proposal process.



visit www.24hrco.com or
call (703) 533-7209 for more information



24 Hour Company your
Visual Communications
Solutions Provider