

# The Executive Summaries

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

\*Association of Proposal Management Professionals

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## Storyboards Are DEAD!

Long Live the Storyboard Process

BY ROB RANSONE

Like most organized proposal managers, you probably use some form of storyboarding to organize your authors' planning of how to respond to a myriad of RFP requirements in a cohesive story that makes you look good. You may use a simple



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form that provides spaces to enter RFP requirements, win strategies, and themes, and a bulleted list of how you plan to respond. It may also have places to indicate—or even sketch—your suggested illustrations. At the other extreme, you may use a multi-page form that includes, not only the above information, but also asks questions or suggests information that you should collect to help you fine-tune your sales story and write your proposal draft. For most of us, storyboarding has been the proverbial life saver. When used correctly it can be a powerful tool for reaching management/ author agreement on a proposal approach and a tool that can save enormous rewriting time and energy later. But even so, do you really like preparing Storyboards?

### Storyboarding—Basically a “Mickey Mouse” Operation

The storyboarding process was reputedly invented by the Walt Disney studios in order to minimize wasted time, effort, and false starts on organizing and preparing their animated cartoon motion pictures. One theory on how storyboarding was brought to the proposal profession is that Howard Hughes, active in both movie and aircraft industries, utilized the concept in the early 1960s in Hughes Aircraft's *STOP* (Sequential Thematic Organization of Publications) proposal methodology.

Storyboarding was great—in its day of manually prepared proposal draft. But, like the electric typewriters of its era, it has outlived its usefulness. Now,

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## President's Corner by Lou Robinson

The APMP-NCA in conjunction with the Chesapeake-NCA had its first all day symposium on January 16. This was a highly successful symposium that was well attended. In addition to over 40 NCA people there were people from Chesapeake, APMP board members and several visitors from other chapters. Many people made contributions to this event. Of course, the key person was Tom Porter, our Vice President and Programs Chairman. He planned the theme, selected the speakers with help from Skip Boyd and Lee Andrese, set the agenda and served as a wonderful speaker.

The speakers were all exciting and dynamic. Listening to speakers for eight hours can be difficult and tiring. However, the speakers for this event spoke with such excitement that I stayed on the edge of my chair. The subjects were all very relevant and I found it to be a very educational experience.

Dennis Doubroff had the responsibility for registration and was able to solve the many problems associated with this function. There were three different registration fees depending on when you paid and whether or not you were a member. It sounds simple, but it was not. There were many that thought they were members, but were not. There

were brand new APMP members who were not yet on the APMP roster. Many of the late people wanted early registration rates. There were issues about who was allowed gratis admission. Dennis tackled all of these problems and methodically and fairly solved them all.

Kate Rosengreen designed the on-line event brochure. This document served us very well. The on-line brochure was very inviting and was easy to use. The evaluation form, designed by Betsy Blakney, has allowed us to learn what the attendees thought of the event and to get their ideas for future events.

I also want to thank all of the others who made contributions. This includes all that attended. The group was attentive, curious and highly interactive. The attendees drew all of the relevant knowledge from the speakers and this was of great benefit to the entire group.

Finally, I want to thank TRW for allowing us to use their auditorium and cafeteria for the event. This provided a beautiful and highly functional facility for the event. They provided all of this at no cost to the APMP. Thus, in addition to all of the other benefits of the symposium, it was also a financial success.

Thanks to all that were part of this.

—Lou Robinson



The slate was elected unanimously as per the ballot.

### The 2002 Board:

President:

**Lou Robinson**

Vice President:

**Tom Porter**

Secretary:

**Betsy Blakney**

Directors at large:

**1. John Bender**

**2. Dennis Doubroff**

**3. Kate Rosengreen**

**4. Vacancy exists**

The board welcomes applicants for this position.

# March Roundtable

## Can storyboards live in a paperless world?

On March 20th, APMP/NCA will feature a presentation by Rob Ransone on *The Running Start Continuum*, a process that ties together the classic storyboard approach with modern proposal automation tools

We pay attention to our constituents! On January 16th, we held a very successful all-day seminar on the topic of **Proposal Careers**, and solicited ideas for upcoming roundtable topics. Many of the inputs were related to new trends in proposal process automation. We are pleased to announce that Mr. Rob Ransone, a prominent user and developer of automated proposal tools, will address this topic at our March Roundtable. This presentation will complement, with examples and anecdotes, the article authored by Mr. Ransone in this month's APMP-NCA publication, *The Executive Summary*.

### Why is the classic storyboard an endangered species?

The storyboard evolved as both a planning tool and a communications medium. In its planning mode, it has served as the author's device for capturing input data (customer concerns, documented requirements, competition strengths/weaknesses, and corporate capabilities), identifying lower level win strategies, and documenting the proposal response strategies. As a communications tool, the storyboard was 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. In the "good old days", a room full of hanging storyboards gave a dramatic view of team progress. Many firms are struggling with how to continue this process in today's environment of dispersed teams operating in virtual workspaces. Mr. Ransone's pitch will address the following dilemmas faced by fans of the storyboard process:

How can tools smooth the transition from storyboard for-

mats to first draft preparation without starting from a new blank page?

How do proposal managers blend the dynamic communications benefits of the storyboard process with the control capabilities of automated tools?

How can the paper-intensive storyboard review process be accommodated by dispersed electronically-connected teams?

### The Speaker

Rob Ransone spent the early years of his career flight-testing both military and commercial aircraft, followed by stints as a program office director at NASA, and as a Visiting Associate Professor in the School of Engineering and Applied Science at the University of Virginia. During these years he began his transformation into the proposal industry as he wrote RFPs and evaluated responding proposals for the USAF and private industry. After 1976, his transformation was completed as he has worked exclusively in proposal preparation, proposal center management and new business process development for LTV, Fairchild Republic and MJI. In 1986 he formed Ransone Associates, and has focused on proposal consulting and automated process software development. Rob is an early member of APMP, a former member of the American Helicopter Society and the Society of Automotive Engineers, and is still an Associate Fellow of the American Institute of Aeronautics and Astronautics.

### Location:

Tysons 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, APMPdoubroff@nciinc.com, and mail your check to: APMP-NCA, PO Box 3063, McLean, VA 22103-3063. To confirm attendance checks must be received by Dennis by March 18. Please forward this email to anyone you think may be interested.

# Calendar of Events

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

MARCH	5	APMP Board Meeting	• Telephone conference
	20	APMP-NCA Roundtable	• Rob Ransone, Storyboards
APRIL	2	APMP Board Meeting	• Face-to-face—Tysons Corner



# Oral Presentations: Why they DO Matter

BY *HELANE JEFFREYS*

An oral presentation is actually a job interview. The competition can be intense, and adequate planning and preparation are necessary. No company can walk into any competitive situation today without gathering its best resources and spending time in preparation.

A highly qualified team of experts, with outstanding resumes, who are nervous and uncomfortable in the presenter role may be viewed as lacking the ability to do the job, when in fact they may very well be the best selection for the contract. When key personnel are unable to effectively communicate their expertise and their ability to get the job done, the government will be deprived of the fullest information for making the best selection.

The job of the professional orals coach is to enable the presenters to effectively convey their existing expertise, experience, and ability to accomplish the contract's goals. People come to oral coaching sessions 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.

Many team members have great commitment and dedication for their work and with coaching are able to clearly provide the government with the benefits and best-value discriminators which set their team and corporate organization apart from others in the field.

Visual aids do not win contracts, individuals do. Individuals who are able to communicate their understanding of the contract, as well as demonstrate their technical competence and commitment to the mission, win contracts.



## The work of oral presentation coaching

There are five key components that constitute the work of orals coaching:

- Verbal and nonverbal communication
- Content clarity
- Use of presentation medium
- Logistics and time management
- Question and answer (Q&A)/sample task sessions/demonstrations

## Verbal and Nonverbal Communication

Verbal communication skills involve learning to use the voice effectively. A skilled presenter uses the voice to highlight important material and to hold the listeners' attention. This is accomplished with variety in volume, pitch inflection, rate, and pauses.

Use of these verbal skills allows the team member's authentic, authoritative, and enthusiastic self to come through and overcomes monotonous, nervous, and/or detached presentation styles. Nonverbal communication skills involve USE OF eye contact, natural gestures and movement, and eliminating distracting body language.

## Content Clarity

Coaches facilitate the transformation of the written script into the presenter's own speaking style. The team's distinctive benefits and discriminators must be clearly and convincingly stated. Presentation content should emphasize main points without providing so many details that these points are diluted.

Careful attention needs to be placed on the opening and closing statements as well as transitions between SPEAKERS AND topics, so listeners have a sense of overview and the direction of the presentation.

## Use of Presentation Medium

Both the graphic materials as well as the orals script should be organized to match the RFP requirements outline. Key points or "take-aways" for each slide should be communicated by using appropriate verbal skills, such as volume, pitch inflection, pauses. Speakers

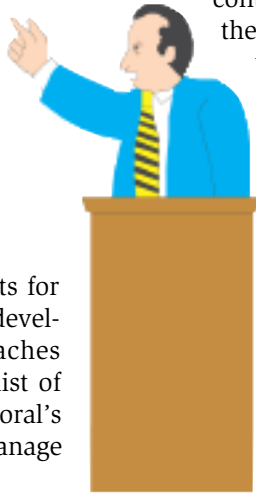
can add variety in the form of illustrations and stories, especially those which come from their own experiences.

### Logistics and Time Management

A clear sense of time limits for each presenter must be developed. Additionally, coaches help the team develop a list of all items needed for the oral's day presentation and manage practice sessions.

### Q&A/Sample Tasks

Q&A, pop quizzes, clarification questions, demonstrations, and/or sample tasks provide additional opportunities for key personnel to further demonstrate their effectiveness in accessing information, problem solving and working together as a team under pressure. It is during the Q&A session that the team leader demonstrates knowledge of the



contract and the ability to coordinate the team's resources for responding to questions. Therefore, the Q&A and/or the sample task sessions require as much preparation effort as the formal presentation component does.

### Bringing Out The Best

In summary, oral presentation coaching is designed to enable presenters to convey the experience and expertise they already possess, as well as their understanding of the contract. This helps the government to select the best possible offeror for the contract. By working with each of these core components, oral presentation coaches contribute to a win/win for both the offeror and the governmental agency.

*Helane Jeffreys is president of Voice For Success® Inc., Columbia, Maryland, info@voiceforsuccess.com. She is a member of the Tyson's Corner Chapter and HOLDS certification WITH the American Speech-Language Hearing Association.*

## MARK YOUR CALENDARS

### 2002 Roundtable Schedule

- **March 20** –
- **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](http://www.apmp-nca.org) and our newsletter for updates on changes for these upcoming events.

## PROPOSAL HELP from RANSONE ASSOCIATES

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

# Storyboards are DEAD

... Continued from page 1

its greatest deficiency—time consuming and frustrating start and stop interruption of the proposal process—needs to be tolerated no longer. Now, there is something better!

“But why do I need something better,” you might ask? Let’s start by identifying the biggest problem with storyboarding: the process itself.

First, program and proposal requirements must be identified from the RFP.

Then take out a blank piece of paper and prepare your proposal outline.

Next, on another blank piece of paper, prepare a cross-reference matrix of the RFP to the proposal.

After that, take a blank Storyboard Form and outline how you plan to address each requirement in your proposal.

After these storyboards are reviewed (you guessed it!), take out (hopefully for the last time) still another blank piece of paper and start writing your proposal.

OK, desktop computers, proposal management software, and word processors have eliminated some of the interruptions, but there is still the problem of starting with a blank Storyboard Form and, then, a blank proposal draft screen.

What we need is a continuous process that incorporates all of the benefits of storyboarding—and there are many, don’t get me wrong!—while avoiding the start and stop and blank-page interruptions. There is an elegant solution, something that can be called a “running start.”

## A Running Start Continuum (RSC) Solves Storyboarding Deficiencies

In seeking to find a simple answer to the problems of storyboards, Ransone Associates, Inc., worked with other Engineered Proposals’ associates to develop a process called the *Running Start Continuum (RSC)*. The RSC process effectively solves the problems with storyboards while retaining almost all their benefits. RSC exploits the productivity of computer-based proposal management systems for online proposal draft preparation, review, and revision. It retains the communications

value of the storyboard process, but eliminates the start-stop frustrations through an online continuum leading from RFP requirements through storyboard organizing and planning to final proposal writing, review, revision, and publication.

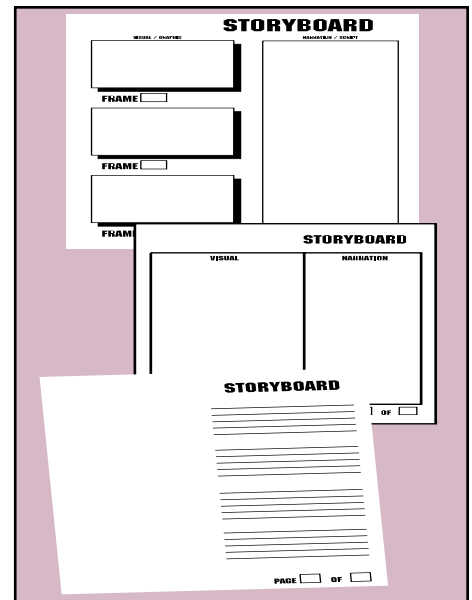
In the RSC process, program and proposal requirements from the RFP, competitive information, and other proposal-relevant data are parsed to the proposal outline in proposal management software. Win strategies, developed in proposal management software, or directly in the RSC documents, can also be included. Then each set of data, correlated by proposal paragraph, is exported to a special word processor document template.

The document template displays the author’s name, the names of any assistants (usually technical contributors), the page budget if assigned, the proposal paragraph number and title, and the *full text* of *all* of the RFP requirements assigned to this proposal paragraph. There is also a place where the proposal manager can provide specific guidance to the author regarding special features or benefits to be emphasized in the draft. The final essential part of the template is a place for authors to summarize their approach to addressing the RFP requirements, win strategies or themes. You can even provide places for the authors to enter useful information to be used in their proposal draft.

Once proposal authors complete this RSC form, all essential proposal guidance and plans are captured in a single location. Then each author completes the RSC form by writing the proposal draft *on this form*, directly after the requirements and storyboard guidance so the draft can be fully responsive. Since the entire RSC file is a word processor document, the author can put anything into the draft—figures, photos, tables, drawings, whatever.

## RSC Facilitates Online Review

The RSC document concept facilitates online proposal draft review because the document includes all of the RFP requirements, win strategies, themes, and



instructions used to develop the sales story. The reviewer can see all of the header, requirements, storyboard, and proposal draft text to verify content and guide improvement of the draft. If reviewers use the word processors’ change bars when making suggestions or entering comments to the author, each reviewer can see what other reviewers have said. This can be invaluable for a proposal team that is not collocated.

One particularly attractive feature of using this approach is that there is no special format required for RSC. If you want to get really fancy, you can integrate your RFP parsing program with a standard word processor mail merge to generate the requirements shred-out, then include macros to hide or redisplay the header, requirements, and storyboard information in any combination. For some reviewers, hiding all of those leaves only the proposal text, which is easier to read without all of the RFP and storyboard information. Reviewers can then redisplay the requirements and storyboard information to verify that the proposal draft is responsive.

## RSC is a cost-effective, author-accepted, RFP-to-proposal continuum

If you’ve followed this so far but never tried anything like it, you’re probably asking yourself, “How does he know this approach works?” The answer is simple: Both Ransone Associates and Engineered Proposals have used RSC on a variety of proposals since its develop-



ment last year. It has been welcomed and universally praised by proposal managers and writers alike. And if the writers like it, you know it's got to work!

We at Ransone Associates call our implementation of the RSC process *RunningStart™*, and it was developed as part of our *Proposals Organized to Win 2000™ (POW2000™)* comprehensive proposal management process. (*Editor's note: See "persuasive INK" Issue # 14, 1st Qtr 1998 for a review of an earlier version of POW. We liked it then and still do.*)

Client acceptance of our implementation of RSC has been gratifying. For example, on a recent major proposal for a Fortune 500 company, their own proposal strategy planning tool (a "Module Specification") was substituted for the word processor template we normally use. We simply customized our template and then created separate forms for 491 proposal paragraphs. The first phase of the RSC process — allocation of proposal requirements to the proposal outline — was completed in about four hours. The forms were then e-mailed to respective authors, printed, and posted on the

walls of the proposal center for continued development and review. On another proposal that included a number of teammates who were not collocated, our *RunningStart™* forms were almost the only guidance that the authors had. Their comment: "This is really the way to go!"

### The Running Start Continuum — A new approach to an old problem

Whether you use *POW2000™* or your own in-house program, the running start continuum process can work for you. You'll discover a way to capture almost all the benefits of old-fashioned storyboards (at least almost all the ones that most proposal teams ever really do!) while at the same time saving time, money, and team frustration. RSC is a new approach to an old problem. Try it — you'll like it! And leave the old, start and stop "Mickey Mouse" Storyboards to Walt Disney.

*Rob Ransone is President of Ransone Associates, Inc. of Wicomico Church, VA. Rob and his partner, Paula, are long-time EP associates and regular contributors to "persuasive INK."*



Looking for a back-issue of the Executive Summary or slides from recent APMP-NCA presentations?

Try our Library site at [www.mediausa.net/apmp/apmplibrary.html](http://www.mediausa.net/apmp/apmplibrary.html)

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# NCA's All-Day Seminar a Success

On January 16, 2002, the NCA chapter conducted its first full-day Roundtable event, at TRW facilities in Fairfax, Virginia. Co-sponsored by APMP's Chesapeake chapter, the topic of the day was the Proposal Profession, with half of the presentations on the subtopic of "managing your career" and the other half on "managing your proposal organization."

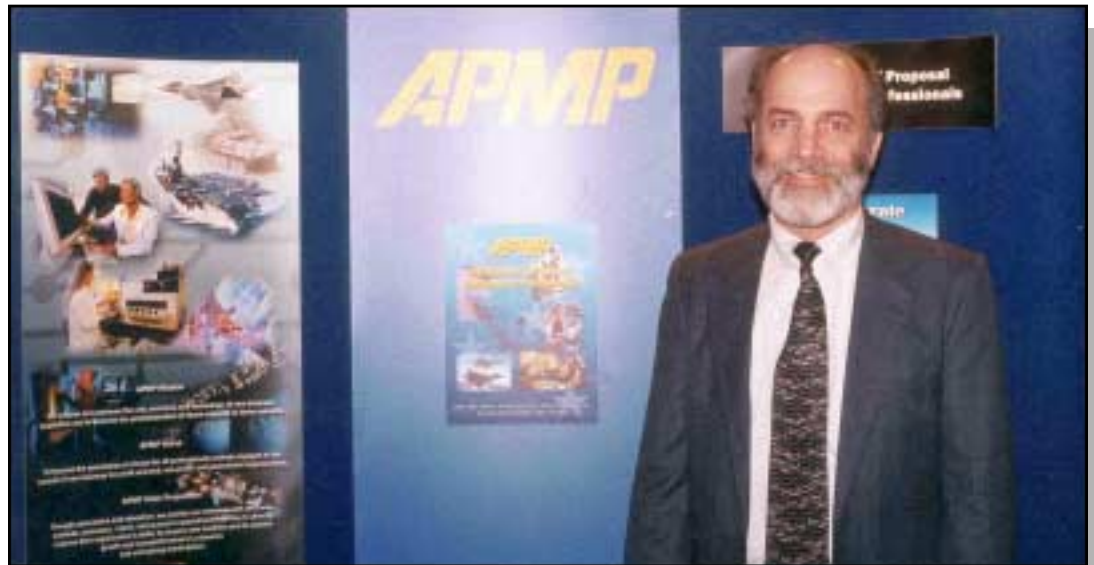
## Presenters and their topics included:

- Eric Gregory**, CACI, Inc., "Proposal Career Paths in Private Industry", and "APMP's Certification Initiative."
- Lee Andrese**, Aquent, "The Free-lance Proposer."
- J.P. Richard**, Advantage Consulting, Inc., "Education of the Proposal Professional", and "Training for Proposal Organizations/Teams."
- Patricia Nunn**, Anteon Corporation, "Organizing Proposal Resources."
- Howard Nutt**, Shipley Associates, and **Mike Humm**, Maximus, "APMP's New Business Maturity Model Initiative."

Since the event came one day after the APMP National Board of Directors meeting in

Arlington, Virginia, many of the newly-elected board members were in attendance, and provided a panel discussion of proposal career trends. Also, a special lunchtime presentation highlighted the career of the late Herman Holtz, a

prominent proposal consultant and career advisor to countless APMP members. A special guest of the chapter was Mrs. Sherrie Holtz, who presented a touching personal perspective on her husband's career.



**TOP:** NCA Chapter Director Tom Porter, the TRW host for the January Symposium

**RIGHT:** Eric Gregory

**BOTTOM:** John Bender (l) and Mike Humm.



According to Lou Robinson, NCA's President, "this seminar met both the board's goals and the expectations of the members, and we hope to continue this format, with new topics, on an annual basis." The event drew over 90 attendees, with a number of out-of-town APMP members from as far away as New York and Chicago. With a buffet lunch, a post-seminar social hour, and liberal breaks, the day offered a good opportunity for networking with other proposal professionals. Attendee feedback was very positive, with all aspects of the event being graded at 4.1 or higher (on a 5 point scale). A great many comments were collected to help make similar future events successful.

To keep costs down, hard copy hand-outs were not provided. Soft copies of the presenters' slides are available at the NCA's publications Web site, at <http://mediausa.net/apmp/apmplibrary.html>



New APMP National Mission Statement:

“Our mission is to advance the arts, sciences and technology of new business acquisition and to promote the professionalism of those engaged in those pursuits.”

# APMP Seminar Photos



**TOP LEFT:** Mike Humm

**TOP RIGHT:** Eric Gregory

**BOTTOM LEFT:** Patty Nunn

**BOTTOM RIGHT:** Left to Right, APMP National Board of Directors, Karen Shaw, Eric Gregory, John Meehan, and APMP Executive Director, David Winton.