The Executive Summary

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*Association of Proposal Management Professionals

Proposal Tips & Techniques Articles

Get an Objective Look: Conduct a Red Team Review

BY DAN SAFFORD

The best way—the only way, really—to make sure your proposal is giving the client what he wants is to have it reviewed by an objective panel that has been briefed to think like the client. This type of review is often called a Red Team Review.

The idea is to assemble a group of people who will read your proposal from the client's perspective. You will ask your reviewers to read your proposal as if they were evaluating it. This means that they will not be looking at the draft as friends—as someone who will say, "Oh, guess I see what they mean," and give you the benefit of the doubt. Quite the contrary. Ideally, if they don't get what you're trying to say, they will say, "I do not see what you mean," and they give your section a failing grade. That's what the customer would do.

This review is arguably the most important in the entire cycle. In fact, if you do no other reviewing prior to this—if your staff is small, if the schedule won't allow it, or if you just don't see the need for this entire review process—you should leave time in the schedule for the Red Team Review.

Who should be on a Red Team?

Pick at least three people to serve on the Red Team (if it's a long proposal, the number could range to up to ten). Ideally, you need as many reviewers as you have major sections of the proposal.

The people you select should be

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LEARN MORE TO WIN MORE

Doing business with the Federal Government poses many challenges, one of which is finding time to attend and participate in professional development activities. I missed the APMP National Conference in May because I was in the throes of a major recompete—a 10-year opportunity—the likes of which required my full attention. This is the second year work got in the way. Not a bad problem in an uncertain economy, just a frustrating one in terms of career development.

At our June APMP-NCA Board Meeting, we mourned the passing of what turned out to be a great conference, or so we heard. While we all wished we had been in New Orleans, none was as disappointed as Lou Robinson, who found out after the fact that he had been an award recipient and was not there to receive it. **Congratulations Lou for receiving the leadership award as the APMP Chapter Chair of the Year.** We had a mini-celebration that night acknowledging how remarkable a leader he is.

Despite the handful of regulars who were absent because they attended the National Conference, we found some comfort in knowing that our last chapter Roundtable was well attended and provided much information on acquisition reform and the progress being made in e-government initiatives.

Every other month the APMP-NCA provides networking and professional development opportunities in the form of a Roundtable dinner meeting. Anyone interested in proposal and business development is welcome to attend. The most popular meetings are those with speakers who have insight into Government arena topics such as trends in acquisition practices like performance-based contracting and competitive sourcing; how Government evaluators think; and words of wisdom applicable to proposal preparation. Occasionally, we call on our own membership to deliver guidance and expertise on strategies for developing new business, team building exercises / collaborative environments, best practices –(what works and what doesn't work for the size of the effort), trends in proposal and business development tools, and managing the proposal process.

Many of the people who attend are first-timers or associates (interested individuals who are not currently members). We cater our programs to all persons (members and non-members) who have an interest in advancing the arts, sciences, and technology of new business acquisition. Our goal is to promote the professionalism of those engaged in those pursuits.

Due to the volunteer effort of professionals like Lou Robinson, the APMP-NCA chapter continues to thrive. What makes this organization so spirited is the quality of programming offered and the commitment of professionals like Lou and yourself who give unselfishly of their time. You need to get involved if you're not. You are shortchanging yourself if you don't attend these sessions.

We all attend for a variety of reasons. Some do so to stay current, others savior the networking opportunities. Whatever the reason, recognize your full potential as a professional by engaging in the information exchange. As our former APMP CEO, Eric Gregory would say, "Give a little to get a lot."

I'm still disappointed about not making it to New Orleans, but I know the knowledge and advice will trickle down through other APMP channels—can't wait to put it to use. ■

Roundtable Announcement

New Day, New Place, New Faces And the NEW 5000 Series Acquisition Regulations

In 2002, we held a joint roundtable in Northern Virginia with the APMP Chesapeake Chapter, and committed to a repeat event when a topic or speaker of great interest comprised a "golden opportunity" to broaden the audience base. This concept has also been officially endorsed by the national APMP board, which encouraged cross-chapter activities as a theme for the fall of 2003. We are pleased to announce that the Chesapeake Chapter has invited us to join them in sponsoring a presentation by Major James Ashworth of the Defense Acquisition University in Ft. Belvoir, Virginia on the recent release of the new 5000 series Acquisition Regulations and Joint Capabilities Integration And Development System (JCIDS).

Who May Attend?

Both the Chesapeake and National Capital Area Chapters employ an open invitation policy. 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 him or her to attend.

If You Plan To Attend…

This year, the Chesapeake Chapter will enjoy the home court advantage and will be the hosts for the event. Note the change in day from our normal "third Wednesday" convention. We look forward to seeing you on the other side of the river….

About the Speaker

Major Jim Ashworth is a Professor of Systems Acquisition Management, and Program Director for ACQ 101 and 201 courses, at the Defense Acquisition University (DAU), Ft Belvoir VA. He has been a faculty member since August 2000, and also performs an additional duty as the Defense Systems Acquisition Management (DSAM) Course Manager.

Major Ashworth is a career acquisition officer. His career includes the following assignments: Aircraft analyst at the former Foreign Technology Division, Staff Officer at Headquarters Air Force Systems Command, and project officer at Wright-Patterson AFB (Chemical Defense program office) and Hanscom AFB (Joint STARS program office). Most recently, he has been assigned to the Assistant Secretary of the Air Force (Acquisition), fulfilling three different positions: Budget integration officer for C4ISR programs, Tactical Data Link Program Element Monitor, and Air Force Liaison to the Assistant Secretary of the Navy for Research, Development, and Acquisition (ASN(RDA)).

Major Ashworth holds a Bachelor of Science degree in Aerospace Engineering from North Carolina State University, from which he graduated in 1984. He also earned a Master of Business Administration degree in 1988 with an emphasis in Finance from Wright State University. He is a graduate of Air Command and Staff College, and is certified Level III in program management as a member of the Air Force Acquisition Corps.

Location

MARITIME INSTITUTE OF TECHNOLOGY is located at 5700 Hammonds Ferry Road, Linthicum Heights, MD 21090, phone: 410.859.5700.

Agenda

5:30 PM NETWORKING
6:00 PM DINNER & PRESENTATION
Cost: $45 per person

Questions?

Regarding the speakers or the topic, please contact Barry Spangler at 410.993.7763 or e-mail Barry.Spangler@ngc.com

For reservation or location information contact Dianne Hibbard at 410.765.5262 e-mail Dianne_Hibbard@ngc.com ■

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.

SEPT	2	APMP-NCA Board Meeting	• Teleconferrence
	18	APMP Roundtable	• Major J. Ashworth, Defense Acquisition Univ.
OCT	7	APMP-NCA Board Meeting	• Advantage Consulting

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knowledgeable in the areas they are reviewing. If, for instance, you have a section on how you will design the HVAC system for a facility, you better have a person who understands HVAC systems for the type of facility you're proposing to design.

Your reviewers should also have understanding of what the client wants. You should brief the Red Team before the review about what you think the client is looking for. That way, the team can be looking to see if your proposal hits the right buttons.

In addition, they should be dedicated to spending the time it takes to give the proposal a thorough review. This is an extra-curricular activity; it takes time out of your team's busy schedule and the chances are good they will have to work after-hours or on a weekend to conduct their review.

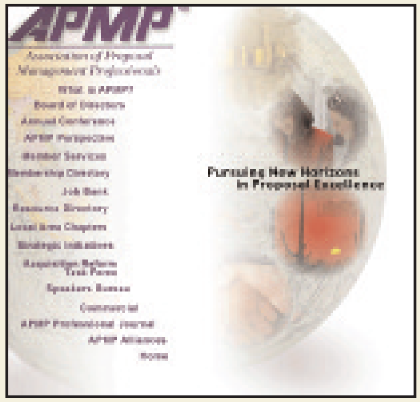
Finally, each person needs to be able to play hardball; you're going to ask them to be very critical, to step on toes if necessary, and to pull no punches. A Red Team member who holds back honest and incisive criticism because of a fear of hurting someone's feelings is not helping the effort.

When should the Red Team Review occur?

The second draft is the best time to conduct the Red Team Review. To get the most out of the review, the draft should be fairly complete. The first draft is too loose and unfinished, and if you wait until the third (final) draft, you don't have enough time to incorporate the Red Team's input.

Yeah, yeah, now you'll say, "We never even have enough time to do a third draft; the second draft is usually what goes to the client." I hear that a lot. And here's what I say:

Number 1: the client usually gives you enough time to do more than two drafts of a proposal; it's just that you usually procrastinate long enough that you



DID YOU KNOW?

Articles from the National Journal are available on-line.

Go to the APMP National Web site: www.apmp.org never give yourselves the time to do a third draft.

Number 2: If you don't take the time to review the second draft, you will likely lose to the team that does. My experience tells me that winners review their proposals from the standpoint of the client; losers make excuses for not doing it.

What should the Red Team do during the review?

During the review, each member will evaluate his/her assigned sections (or the whole thing, as the case may be) for the following, in order of importance:

1. Responsiveness to the evaluation criteria and other solicitation requirements.
2. Convincingness of the proposal, including technical accuracy, substantiation of claims, and clear client benefits.
3. Clarity of the writing and the graphics.

During the review, the team members should do the following:

- Identify any problems, errors or omissions connected with the solicitation requirements.
- Identify the strengths of the proposal.
- Identify weaknesses and resolutions to them.
- Emphasize how the proposal stacks up against the evaluation criteria.
- Emphasize how persuasive—or not—the proposal is.

MARK YOUR CALENDAR

Fall Seminars:

APMP - Valley of the Sun, Phoenix Arizona, 2003 Fall Seminar Sept 26

APMP - Georgia-Carolina, Southern Proposal Accents Fall Conference Sept 26

For more information on the events go to www.apmp.org and visit the link to the chapter Web sites.

- Recommend solutions. This is a critical element of the job. Pointing out errors is one thing and it is the easy part. The hard part comes when the reviewer has to come up with plausible, useful ways of resolving problems with the proposal. This is the true value of the Red Team review.
- The Red Team DOES NOT spend time correcting punctuation and grammar or wordsmithing the document. This is not the time for it.

When you write a proposal, you run the considerable risk of becoming so enamored with the elegance of your solution—both your technical solution to resolving the client's need and your solution for presenting it in your proposal—that you grow less and less capable of being a good judge of the most important aspect of any proposal: Will the client feel so strongly that it meets his needs that he simply cannot eliminate it from the competition? ■

39 Ways to Lose at Government Orals

BY HELANE JEFFREYS

To really understand a subject, one should study and avoid its opposites—according to management expert Steven Covey. These ideas can be used when preparing for oral presentations.

Voice For Success orals coaches have collected such opposites from lessons learned over the years. Here are 39 errors that corporate teams have made:

1. Failing to do a critical review and analysis of the RFP.

2. Neglecting to identify and speak to the real customer.

3. Presenting discriminating features that are not unique to your team or company.

4. Presenting the solution with disregard for the customer's needs and mission objectives.

5. Failing to respond to the statement of work.

6. Failing to identify the strengths and weaknesses of the incumbent and other competitors.

7. Making the evaluation process more difficult for the customer by failing to organize slides and presentation using the RFP's own sequence of content categories.

8. Giving the government panel solutions they did not ask for.

9. Failing to identify and offset areas of their own weakness that may be used by the competition to their advantage.

10. Failure to match time allowed for content areas with the evaluation percentages indicated in Section M.

11. Confusing your team and company features with benefits for the customer.

12. Using inappropriate humor.

13. Reading continually from notes and failing to make eye contact.

14. Using qualifiers and nullifiers in the presentation, leaving the listener uncertain of team's capabilities, confidence and commitment.

15. Failing to communicate their passion for the work.

16. Failing to find and fill in the information gaps in the presentation.

17. Responding to the government panel questions with such sarcasm, "As I said earlier, …" or "This was already covered in the written proposal."

18. Failing to highlight the team's benefits for the customer in slides and verbal presentation.

19. Failing to realize that Q&A responses are assessed not only on the content, but also on how the team handles the question. (What is said and how it is said).

20. Failing to understand the difference between a briefing (imparting information to people who do not have the information) and a job interview (presenting technical and managerial competence, as well as being a team of people the government would like to work with).

21. Making politically incorrect statements when referring to gender, race, ethnicity or politics.

22. Employing a patronizing style of communicating (talking down to your audience) "What you need is…." or "What you should do is…."

23. Failing to provide sufficient time for orals coaching sessions and orals red team.

24. Arriving without back-up equipment.

25. Using statistics that can't be verified on the spot.

26. Failing to strike a balance between planning your presentation content and slides, on the one hand, and training for the oral presentation, on the other hand.

27 Not having all members of your team available for orals coaching sessions.

28. Omitting real-time run-throughs.

29. Running out of time during your presentation on orals day.

30. Not recognizing that it takes extensive preparation to sound spontaneous.

31. Underestimating the communication power of nonverbals—eye contact, body language, pauses, smiles.

32. Sounding and appearing unapproachable or unfriendly.

33. Choosing an over-hyped, too-flashy presentation.

34. Making vague, unclear, general statements.

35. Failing to practice the Q&A thoroughly with a comprehensive, challenging list of questions.

36. Failing to demonstrate that the program manager is the leader of the team.

37. Missing the opportunity to demonstrate the program manager's skills, knowledge, and leadership in the Q&A session. For example, the program manager: **a.** Does not know the answers to questions; **b.** Does not know the correct person to provide the answer; **c.** Answers too many questions and fails to call on the team members who are specialists; **d.** Passes too many questions onto team members; **e.** Is defensive and unfriendly; **f.** Does not know team members' names; and **g.** Rambles.

38. Making it difficult to follow the presentation by talking too fast, too soft and/or too monotone.

39. Failing to practice out loud.

In conclusion, the way to win at orals depends on effective Practice, Practice, Practice, Practice… ■

This article was kindly provided by Voice For Success. They can be contacted at: http://www.voiceforsuccess.com.

APMP Mentoring Program

P. Nunn, Program Administrator

The Mentoring Program was initiated at the 2002 Annual Conference. The purpose of the program is to further develop business development/proposal professionals through the sharing of knowledge. This totally volunteer program assists in pairing a senior level professional with a junior professional for the purpose of learning. Those interested in participating should go to the APMP Web site (www.apmp.org) to read the guidelines and complete an application.

Status since program inception:

Eighteen mentor applications received; 15 protégé applications received; 6 pairs selected and participation confirmed; 2 training sessions occurred; applications available on Web site.

Pairings are determined by assessing locations; interests; company size; and knowledge of the individuals involved. Training occurs via conference call and a presentation (e-mailed prior to the meeting).

Current Administration Challenges

Since applications can be received at any time, the pairing and training are completed semi-annually or annually instead of quarterly.

Administrator workload is extensive. Although we've received mentor applications, the various (and many times remote) locations cause difficulty when trying to match a mentor. The administrator spends significant time making calls and tracking down key APMP members/chapter heads to get some names of potential volunteers. The APMP member database can only provide some assistance, once you have a potential name. Current needs include: Fairborn, OH; Ft. Myers, FL; and Northern Virginia/Baltimore.

Everyone is busy. As can be seen by the comments listed below, several pairs have not bonded as their schedules are not conducive to regular meetings.

Status to date:

Three pairs still actively in the program; next pairing/training planned for August—working pairings now.

The program administrator taps in quarterly via e-mail to assess how the pairs are progressing. Below are various comments received from the participants.

"Our schedules are full like yours and it has been difficult to communicate. Even with email, finding the time to work on personal and professional development can be challenging."

"[The mentor] always makes herself available when I call on her. Her leadership and guidance have been invaluable."

"It's a good program—I don't think you should let it fade away. The problem with it is that the work is never-ending so you have to truly make a commitment to meeting regularly, despite the workload. That can often mean you make your phone calls during lunch or after work hours."

"My lack of participation notwithstanding, I still feel the mentor program is a good idea and would recommend both it and my mentor to anyone—with the caveat of making sure both parties can set aside the time to make it work."

"This program is a great idea, but it's very difficult to execute. Given the nature of our jobs, you never know what's going to come up and it can be very hard to plan. We started out strong, but too easily gave in to other demands rather than trying to work this in no matter what. Maybe it would work better if there was some additional outside motivation - a conference call with all pairs every other month, or a shared report, etc." ■