

The Executive

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*Association of Proposal Management Professionals

The Use and Limitations of Boilerplate in Proposals

BY RUSSELL SMITH

Proposal managers and profit center managers everywhere cherish the dream of finding a boilerplate solution that really works effectively. The proposal manager desires a solution that will lighten his work, and the profit center manager wants a solution that will lessen his budget. The goal is a system, a plan, an approach, or a template that will make it possible to



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effectively reuse past proposal pieces in the never ending quest to win more business.

This article addresses the problem of developing/introducing/using proposal boilerplate. It is based on the author's 25-year experience as an industry professional, along with interviews of several other professionals who have insight into the boilerplate issue. It attempts to answer the following questions:

1. What are the proposal situations that lend themselves to a boilerplate approach?
2. What are the pitfalls to watch out for?

3. What parts/sections of the proposal lend themselves to a boilerplate approach?
4. What types of systems/repositories/tools have worked successfully in boilerplate reuse situations?

What company situations are good for boilerplate?

There is agreement that boilerplate is often highly useful for product proposals. The classic case in which a company can leverage a boilerplate solution is in proposals for product or service

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President's Corner by Betsy Blakney

The Year in Review

As I get ready to turn over the gavel to another board member, let me reflect on the past year's success stories.

A Year of Accomplishments...

THE APMP-NCA BOARD

- Revamped the APMP-NCA Web site
- Initiated a Web site Resource Directory featuring company capabilities to include training, orals support, proposal software, etc.
- Re-energized the Corporate Partner Program by signing up two members: Privia and Shipley Associates
- Updated and published a membership brochure
- Held a joint meeting with the Chesapeake Chapter, despite the curve ball thrown by Hurricane Isabel
- Welcomed 53 new members to APMP, who are affiliated with the NCA

What I am Grateful For...

A strong board of directors who ensured the chapter ran smoothly and efficiently...

Kate Rosengreen, Vice President and outgoing Newsletter Coordinator, for assisting me throughout the year and putting together a professional publication that kept our members informed. Our updated brochure has Kate's professional touch.

Lou Robinson, Secretary/Treasurer, for juggling more chapter activities than you know and keeping track of all our finances and meeting records. Everyone should be so lucky to have such a great mentor.

Dennis Doubroff, Roundtable Coordinator, for all the additional time and effort it took to coordinate the roundtables with the hotel and speakers and by providing attendees with ID badges coded for quick identification. It made networking so much easier.

Russell Smith, Membership Chair-



person, for sending out letters welcoming new members and encouraging associates to join APMP and affiliate with NCA. We all appreciated the occasional free drink offered during networking sessions.

John Bender, Director-at-Large, for encouraging me to get involved in APMP in the first place. His background in the chapter and perspective on national and professional issues has benefited all of us. He's our point-of-contact for the Corporate Partner Program.

Tom Porter, Programs Chairperson, for responding to member feedback by providing us with interesting and topical speakers and programs. His energy and passion for advancing personal and professional knowledge remained even after he resigned from the board.

Tom Harmon, Director-at-Large, for availing himself of the opportunity to get involved. Tom has a knack for seeing the other side and helped us work collaboratively through some contentious issues. He will do much to help shape the future direction of the chapter.

Incoming Newsletter Chairperson... and taking over The Executive Summary coordination. INSERT NAME OF NEW CHAIRPERSON

APMP-NCA is an all-volunteer organization. Each of us participates with certain goals and benefits in mind. Over the past three years, I have witnessed board members sacrificing much to volunteer their time and talents to advance

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Roundtable Announcement

Wednesday, January 21, 2004

Basics of Capture Management—Panel Discussion

Start off the New Year by re-evaluating your business development processes. In November 2003, APMP-NCA members and associates examined the Capture Management Life Cycle framework. We learned that winning new business depends on a structured approach. This roundtable is the second in a series of programs designed to help the practitioner examine current processes, incorporate best practices, and focus on continuous process improvement. Join us as we go Back to Basics.

The panel will focus on highlighting the fundamentals of a disciplined and effective Capture Management Process from a number of different perspectives. Panel members, selected from highly successful organizations, will each present their view of fundamental Capture Management practices necessary for success. The intent is to provide and discuss successful Capture Management fundamentals and to engage in related dialogue.

The Panel:

Eric Gregory is Vice President of Proposal Development at CACI International Inc. He has served in all Business Development roles—Marketing, Capture, and Proposals over his 25-year career in the business. He has served as CEO of APMP twice and as APMP Conference Chair in 2000 and in 2003. He is a recipient of APMP's William C. McRae Founder's Award.

Nancy Kessler is the Vice President of the Shipley Associates Process Consulting practice. She manages all process consulting operations, reporting to Mr. Howard Nutt, Senior Vice President of Consulting. Nancy has more than 15 years experience in business development (BD) and has been with Shipley Associates since 2000. She also served as a contributor

to Shipley's development of the Business Development Capability Maturity Model® (BD-CMM). **

Jack Wrobel is a Senior Associate with more than 15 years experience in developing new business. His win rate with Shipley Associates is 95 percent. He brings both federal and industry program management and systems engineering experience to capturing business opportunities. His most recent successes targeted the Missile Defense Agency and the Federal Aviation Administration. The highly-structured approach to Capture Management is also applicable to his other major interest, political campaigns.

****Capability Maturity Model and BD-CMM are registered trademarks of the Carnegie Mellon Software Engineering Institute**

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 him or her to attend.

Location:

Tysons Corner Holiday Inn on International Drive in McLean, Virginia

Agenda:

5:30pm Networking

6:15pm Buffet Dinner

7:00pm Announcements, Featured Presentation

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

IF YOU PLAN TO ATTEND...

Please RSVP to Dennis Doubroff at apmpdoubroff@aol.com and mail your check to: APMP-NCA, PO Box 3063, McLean, VA 22103-3063. RSVP and send check by Friday, January 16. The earlier the better to reserve your seat. ■

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.

JAN	21	Roundtable	
FEB	3	Board Meeting	• Face to face
MARCH	2	Board Meeting	• Voice
	3	Executive Summary	• March/April
	17	Roundtable	

The Use and Limitations of Boilerplate in Proposals

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commodities—for example PCs and PC maintenance. However, even proposals for complex solutions can sometimes be handled with automated boilerplate, if the service and product line includes well-defined items that do not vary much from one proposal to the next. If the bidder only needs to prepare a proposal that describes the offering, he can effectively use an automated boilerplate approach to develop the proposal.

One critical area a boilerplate solution usually cannot address is customizing / tailoring the proposal to strongly focus on a specific customer requirement. If the bidder is trying to prepare proposals that focus on the customer instead of his own product, then the value of the automated boilerplate approach is greatly reduced. Carl Dickson, an industry professional who has experience developing automated boilerplate solutions, says this:

What most people don't realize about boilerplate is that it doesn't save you any time. Look at the best proposal—a proposal that is fully customized or fully

optimized against the perceived evaluators. No off-the-shelf boilerplate can be optimized for every evaluator. Even if no product or service details have changed since the last proposal, you will still have to change more than 50 percent of the words to optimize the write-up for the customer. Boilerplate will not save you time or money. However, it can help you create a better proposal, because it helps you remember all of the features and benefits the proposal should address.

Pitfalls in Using Boilerplate in Proposals

The pitfalls to the effective and efficient use of boilerplate are many and could be the subject for a separate article. Due to space limitations, this article will discuss four primary problems:

1. **Expecting too much**—We have noticed that, especially some of the executives who have to pay for the proposals but who don't have proposal experience, expect too much. For example, they sometimes want to have a "one size fits all" boilerplate solution in a company where the group is usually creating custom proposals for widely different types of programs. They lack the experience to know that, highly complex custom proposals almost always have too much variance to be produced through boilerplate solutions.
2. **Failure to tweak**—According to Tom Porter, a proposal manager with large company experience, busy authors all too often fail to adequately edit the boilerplate. Tom says, "Sometimes people will assume that, when something is from a winning proposal, it is good and will fit anywhere. So they fail to carefully tweak the material." A common example of this is picking resumes and past performance from an old proposal and inserting this material in the new proposal without rework. Other times, proposal groups will develop boilerplate for a specific purpose—for example, a write-up on software development—and put the write-up on the shelf, with the expectation that they

can then pull it down from the shelf and use it at will in the future without further tailoring.

3. **Inadequate analysis**—The type of approach that will work effectively to develop, manage, maintain, and use boilerplate varies widely from company to company, and what will work for one company will not work for another. If a company is going to develop a boilerplate system that will work for them, they must conduct a careful analysis of their situation. Such an analysis would address questions such as: What types of proposal pieces will be needed and how frequently; how do we share the information across a firm that may have offices at many different locations; and what is the process for updating the corporate boilerplate. It is typical that companies do not do enough careful analysis, and thus their approach to boilerplate management and use is not as effective as it could or should be.
4. **Neglecting the maintenance requirements**—All boilerplate repositories have maintenance requirements, and companies establishing boilerplate capabilities often do not plan for adequate maintenance. Automated systems and tools have to be provided to store and find the boilerplate; individuals have to be designated with the responsibility to maintain and update the boilerplate; rules have to be devised as to how frequently items such as resumes and past performance are updated; etc.

Which Proposal Sections Can Benefit Most from Boilerplate?

The answer to this question again depends on the situation of the company. A firm typically preparing simple proposals to sell commodities may be able to benefit from a highly automated process that will turn canned boilerplate into a nearly finished proposal based on a few mouse clicks and some simple data entry. At the opposite extreme, nearly any small business can benefit from having, at minimum, a repository of resumes and past performance. Most companies have a management plan or

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management plans that can be edited from one proposal to the next. Many companies use boilerplate plans such as a Quality Plan, Staffing Plan, Contract Management Plan, etc. that will serve as an effective starting point from one proposal to the next. In a custom solution environment, it is more difficult to use Technical proposal boilerplate.

What Type of Tools are Good for Boilerplate

Boilerplate management tools currently available vary from simple to complex. At the complex end are elaborate custom systems such as those provided by Sant Corporation, which attempt to produce most of the proposal using a highly automated approach. At the opposite extreme are the simpler approaches based on Microsoft Word files on a desktop computer. The consensus is that, for most companies large and small, the most cost-effective approach is usually a repository for Word files with appropriate search tools. Which search tool to select varies



from situation to situation and is a good subject for a future article. Tom Porter, who has worked in a big business setting says, "The trick is to get as much boilerplate as possible into your boilerplate repository and to have tools to find it. That way, your authors can hopefully find appropriate sections for a wide range of different needs." Many companies will also need to open the boilerplate repository to their intranet so the data can be shared across multiple company sites. ■

Changed your email address?

Make sure you receive Chapter announcements and the Executive Summary newsletter!

You can update your personal information on the APMP-NCA Web site

Go to www.apmp-nca.org

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Presidents Corner: The Year in Review

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the objectives of the APMP and the National Capital Area Chapter. Without their commitment, progress would have been slow, if not impossible.

Passing the Baton...

As I leave the board, I have few regrets and wish for my colleagues, and other supporters alike, a year of outstanding opportunities and initiatives that will further advance the profession. Each of you has unlimited opportunities to participate through publication, expression of professional experiences and personal opinion through insightful and stimulating presentations, networking to build your own personal contacts while interacting with others who understand the demands of our profession, and serving on the board in any number of capacities.

Take advantage of our panel's 55 years of experience in winning business and join us at the January 21st roundtable. I personally look forward to seeing/meet-

ing you at the upcoming event and expressing my thanks for allowing me to have a productive, fun-filled term as your president.

On behalf of the board, we look forward to your continued support and attendance in 2004. As always, we encourage your comments and feedback on strengthening the chapter. ■



Coming soon...

Resource Directory

An opportunity for you to promote your organization to the APMP NCA proposal community.

This is a facility to support the NCA community to identify resources to help in their proposal process.

If you are interested in presenting your services on this Web site contact Mr. Lou Robinson at lrobinson@win-pro.net.

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NOVEMBER 2003 ROUNDTABLE



1. Betsy Blakney (APMP-NCA President) Speaker, Gregory Garrett (Lucent Technologies) and co-author, of The Capture Management Life-Cycle Reginald Kipke (Lucent Technologies).

2. Betsy Blakney presenting certificate to James Cooper, Corporate Partner, Privia.

3. Members Ed Hill and David Poulin.

4. Members enjoying dinner before the presentation.

