Executive Summary

A Publication of the Association of Proposal Management Professionals (APMP) National Capital Area (NCA) Chapter

Summer 2007 Volume XIII, Issue 3

Special points of interest:

- As an NCA member you have more opportunities for networking and education than anywhere else in the country!
- Access presentations from previous APMP-NCA Roundtables at www.apmpnca.org/presentations.html
- Self-update your email address directly on the NCA *Member and Colleague Database* page on NCA's Web site

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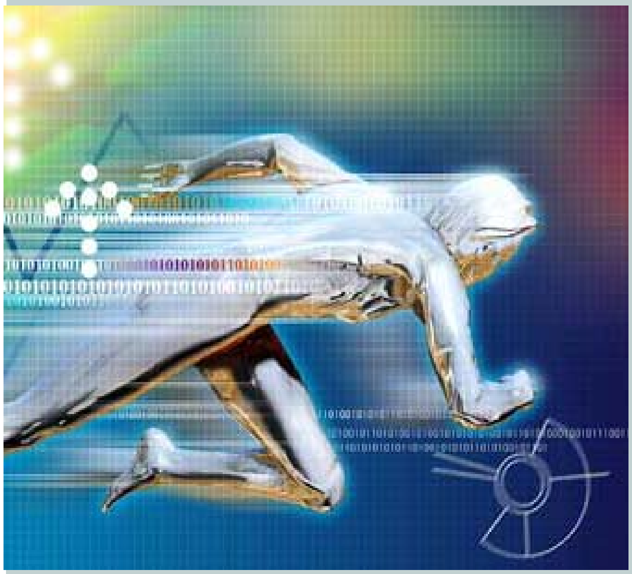
From Proposal Manager to Proposal Producer



Michael A. Scruggs, PPM.APMP

It's hard to believe that we once had only one option to acquire RFP information, and that was by trolling the old Commerce Business Daily (CBD) or—if you were lucky—getting information straight from an agency. Finally, in the mid-1990s, deliverance came when the CBD was replaced with electronic listings on the CBD*Net,* later replaced by Federal Business Opportunities, better known as *www.fedbizopps.gov*.

In little more than 10 years, the Government completely switched from paper notices to e-listings. Today, we browse the Internet daily, sometimes hourly, to get Government's most current solicitation information.

Those of us responding to solicitations have generally done so with printed documents. In 2004, the Federal Government changed the definition of "in writing" to include electronically transmitted information (FAR 52.215-1). This change opened the door to responding to Government in new ways, such as submitting proposals on compact disks (CDs). Only last fall, for example, GSA required all contractors responding to Alliant GWAC solicitations to do so by submitting their responses on CDs. Another trend in submitting proposals is via email. The Government's move towards paperless bids will likely become the norm in the future.

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Sponsored by the NCA Chapter

Professional Day 2007

Patricia Kent

The planning wheels are in motion, and the date and location for Professional Day 2007 are set! This year's event will be held on Tuesday, October 16, 2007, at the Northrop Grumman facility located at 12900 Federal Systems Park Drive, Fairfax, VA. This single-day event will begin with registration at 8:00 a.m.

Last year's Professional Day was a resounding success—and the Planning Committee intends to build on that success to make this year even better. Thanks to feedback we received last year, we are

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NCA Chapter Wins Chapter of the Year Award!

At its 18th Annual Conference in Savannah, GA on May 30, APMP's Board of Directors presented the Steven Shipley Award to the NCA Chapter as the 2006 APMP Chapter of the Year.

The NCA Chapter competed against the other national and international APMP chapters for this high recognition. Named after one of the APMP co-founders, Steven Shipley, the Shipley Award replaces the Everest Award, which the NCA last won in 2004.

Additionally, the APMP Board jointly awarded the Steven Myers Chapter Chair Awards to Dana Spears of the Southern California Chapter and Michael Scruggs of the NCA Chapter. Like Steven Shipley, Steven Myers is one of the original founders of APMP. Way to go, NCA!

Interact with the Government so that you are perceived as a partner who understands their needs and supports their outcomes.

Mastering the Art and Science of Capture Management

How is it that some companies are favored to win the biggest Government contracts even before the RFP is released?

Find out how to create a strong capture management program that delivers more "wins" for your proposal team at:

Mastering the Art and Science of Capture Management

APMP-NCA's July Roundtable July 18, 2007; 5:30 – 8:30 p.m.

Register now *at* *www.apmpnca.org/071807roundtable.html* for this breakthrough session aimed at both capture and proposal professionals.

Come to the July 18 Roundtable, and the very next day on the job you'll know how to:

- Interact with the Government so that you are perceived as a partner who understands their needs and supports their outcomes.
- Articulate what the Government really wants so that their requirements make sense in the upcoming RFP.
- Close the gap between the capture and proposal processes using valuable capture intelligence to slam dunk your next bid.

Tap Bob Lohfeld's vast knowledge and proven track record in capture management and proposal development.

Our presenter, Bob Lohfeld, is the Founder and CEO of the Lohfeld Consulting Group, a national company specializing in Capture Management and Proposal Development for Government Contractors.

Join Corporate Partner, Shipley Associates, the Guest Host for this event and network with more than 150 of your colleagues.

Register now *at* *www.apmpnca.org/071807roundtable.html*. Space is Limited!

Agenda: 5:30 p.m. Networking
6:15 p.m. Dinner (vegetarian entrée upon request)
7:15 p.m. Announcements and Program

Registration Fees: $65 (payment received in advance) or $75 (register at the door; limited seats available and will be filled on a first-come, first-served basis.

Corporate Partners: Please RSVP by July 14 even if using a free coupon.

Location: Marriott Fairview Park, 3111 Fairview Park Dr., Falls Church, VA 22042-4550
703.849.9400

If you plan to attend...*register now* at *www.apmpnca.org/071807roundtable.html*
and pay online by July 14, 2006 using PayPal, or RSVP via email at ***rsvp@apmp-nca.org*** and mail your check to APMP NCA, POB 3063, McLean, VA 22103-3063.

Close the gap between the capture and proposal processes using valuable capture intel to slam dunk your next bid.

Ask the Graphics Guru

Mike Parkinson

Welcome back to our quarterly APMP-NCA column, *Ask the Graphic Guru*, in which Mike Parkinson addresses NCA members' pressing graphics questions. Email your graphics questions to *Executive Summary* Editor, Beth Wingate, at *beth@apmpnca.org* for possible use in upcoming issues.

A repeatable three-step process empowers technical staff to convert their words and ideas into clear, communicative, and compelling graphics.

How do I get my technical staff to value and effectively use graphics?

Professionals who lack technical know-how, resources, or experience using graphics are reticent to use visuals and, as a result, tend to devalue visual communication. There are two approaches I take to win over those who push back against graphics.

I share empirical evidence supporting the value of clear visual communication. The following are useful facts based on research from the attributed institutions:

- We process visuals 60,000 times faster than text—3M Corporation.
- 40% less time is needed to explain complex ideas when using graphics—Wharton School.
- Using visuals improves learning as much as 200%—University of Wisconsin.
- Graphics improve retention by 38%—Harvard University.
- Presenters who use visual aids are 43% more effective in persuading audience members to take a desired course of action—University of Minnesota School of Management.

I usually share graphic samples that support these statistics. For example, is it quicker to describe a circle as a *curved line with every point equal distance from the center* or to show a circle? Is it easier to describe how an organization is structured or show an organizational chart? You can also use real-world examples from successful past proposals (or from the Internet) that illustrate the power of good visual communication. However, I do point out that graphic communication is not *better* than text. Instead, the combination of graphics and words has a communicative power that neither singularly possesses. The subject matter expert (SME) is not wrong to use text; however, she is better served to use both. If she does, the likelihood that the audience will better understand and value this insight increases exponentially because the audience can quickly refer to and digest the SME's information.

I have related war stories and client testimonials that underscore the value of using graphics in proposals. For example, Greg Giddons, Executive Director of the U.S. Customs and Border Protection Secure Border Initiative (SBInet) Program Management Office (and part of the SBInet decision-making team) said that visuals help tell the story. In addition, he said that graphics give evaluators a break because after reading several proposals, "200 pages of text begin to look like ants." In fact, Greg saves his favorite graphics and keeps them with him for reference—a testament to the fact that evaluators love graphics.

I share a repeatable three-step process with the technical staff that empowers them to convert their words and ideas into clear, communicative, and compelling graphics. For many proposals, it is not the technical team's responsibility to render the graphics but rather to conceptualize the visual representation that helps the audience understand, remember, and be influenced by the presented material. Because information is often lost in translation between the technical staff and the designer, it is in the best interest of the team and the company to teach the SMEs how to conceptualize their graphics effectively. Most designers focus more on the rendering itself than on the information communicated and sometimes have little information about the audience or the subject matter being depicted (which are key to generating a successful graphic). Armed with the know-how to conceptualize winning proposal graphics and the understanding that they will focus more on the correct depiction and not on how to do the final rendering, the technical staff's apprehension dissolves. Plus, they can better communicate their ideas to the designer, who will generate a final graphic that more clearly depicts the technical staff's ideas.

*Know your P.A.Q.S. —**P**rimary Objective, **A**udience, **Q**uestions that need to be answered to achieve the primary objective, and the **S**ubject matter.*

The three-step process is as follows:

Know your P.A.Q.S.—Primary Objective, **A**udience, **Q**uestions that need to be answered to achieve the primary objective, and the **S**ubject matter.

Use a combination of four methods to convert your ideas into graphics—Literal Method, Substitution Method, Quantitative Method, and Assembly Method.

Render or direct the rendering of the final graphic—There are a few simple rules to follow that ensure that the final graphic is successful. (To learn more about this three-step process visit www.BillionDollarGraphics.com).

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Dennis Green

Michael Scruggs *(center)* and Beth Wingate *(right)* represented the NCA Board of Directors at the APMP conference and held a drawing for six gift baskets sponsored by the NCA Chapter.

Savannah Conference Highlights

NCA Presents at Conference

Beth Wingate and Michael Scruggs presented “Sharing a Chapter’s Secrets: Inside the NCA.” They received a lot positive feedback from attendees involved in new, reorganizing, and to-be-formed chapters—including one person from South Africa! Many people said that this presentation alone and the electronic handouts and templates provided made the conference worthwhile attending.

NCA Chapter Giveaway

The NCA Chapter sponsored a giveaway of six baskets of delicious candy from the River Street Sweets—a Savannah institution!

Next APMP Conference

The next APMP International Conference will be held in Palm Springs, CA in May 2008.

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Dennis Green

Michael Scruggs accepted the Shipley Award from Steven Shipley , one of the APMP co-founders. The Shipley Award replaces the Everest Award, which NCA last won in 2004.

The U.S. Comptroller General has now tackled questions related to what happens if the proposal is delayed or mishandled after reaching the Government mailroom. Read Shlomo Katz' *Legal Corner* for more details!

Legal Corner

Proposal Issues in the Electronic Age

Shlomo Katz

As new technologies have found their way into the procurement and proposal processes, many of the legal issues that have arisen have simply been new forms of the same old questions. These include: When is a proposal considered received? What electronic work papers are part of the proposal? When is a contract formed? In this article, we will briefly look at recent cases discussing each of these issues in the current technological environment.

When is a proposal considered "received"?

Federal Acquisition Regulation ("FAR") § 52.215-1 (c)(3) states, in part, "Offerors are responsible for submitting proposals, and any modifications or revisions, so as to reach the Government office designated in the solicitation by the time specified in the solicitation." Over the years, many bid-protest decisions have looked at when a physical proposal is considered to have reached "the Government office designated in the solicitation," and what happens if the proposal is delayed or mishandled after reaching the Government mailroom. A bid protest decision issued by the U.S. Comptroller General in October 2006 has now tackled some of the analogous questions in the context of a proposal submitted by email.

The protestor, Symetrics, had transmitted its Final Proposal Revision ("FPR") electronically to the contracting officer's email address on August 23, 2006. At 2:58 p.m., the president of Symetrics phoned the contracting officer to notify her that Symetrics had submitted its FPR. The contracting officer received the email while on the phone with Symetrics' president and told him that it was received at 3:01 p.m., according to her computer. The email, according to the contracting officer's computer, showed the email message forwarding the FPR was sent at 2:54 p.m.

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Subjective factors—presentation skills and interpersonal skills of the various presenters and the rapport they are able to build with the evaluators—play a very large part in determining which company is awarded the contract.

The Oral Presentation: Tie-Breaker for Winning Government Contracts

Lawrence L. Tracy

Introduction

Over the past decade, the Federal Government has placed increasing emphasis on the "oral presentation" in awarding contracts. Additionally, Government agencies, in their Request for Proposal (RFP), are stipulating that only those who will be working on the contract, especially Project Managers, are to deliver the oral presentation. This is obviously intended to permit Government evaluators to have an "eye-to-eye" meeting with those with whom they will be working, thereby resolving issues and questions before the contract is awarded.

In a very real sense, the once lightly regarded oral presentation has become the essential tie-breaker among otherwise equal companies vying for lucrative contracts from the Government.

This new emphasis on the oral presentation was not initially greeted with universal acclaim by companies. Most of them had developed a skilled cadre of proposal writers and probably felt a bit uneasy about having their economic future riding not on the demonstrated ability of these writers, but instead on the verbal skills of engineers and technicians who have not been called on in the past to make marketing presentations. Under the new Government rules, the "doers" had to become "sellers."

Although the oral presentation is now an accepted fact of life in the Government contracting world, the apprehension has not lessened. Contributing to this is that "public speaking," in survey after survey, is viewed as one of the leading phobias in the United States. The best known of these surveys listed "speaking before groups" as the number one fear, ahead of even "death." This led Jerry Seinfeld, in the opening of one of his television programs, to quip that this meant that most people would prefer to be in the coffin than required to deliver the eulogy.

Such anxiety is intensified when millions, often billions, of dollars are resting on the speaking skills of people making oral presentations for Government contracts. Uncomfortable and unsettling as they are, however, oral presentations are a fact of life for companies vying for Government contracts.

While evaluators' emphasis will be on substantive, RFP-responsive information, there can be no doubt that subjective factors—the presentation skills and interpersonal skills of the various presenters and the rapport they are able to build with the evaluators—play a very large part in determining which company is awarded the contract.

In a very real sense, the once lightly regarded oral presentation has become the essential tie-breaker among otherwise equal companies vying for lucrative contracts from the Government.

The "Team" Presentation

Competence Indicator. Most companies responding to a Government RFP seek to gain leverage by partnering with other companies. This is a "win-win" arrangement, as the complementary skills of different companies can be applied to the RFP requirements, and the Government stands to gain from the combined skills this consortium of a prime contractor and subcontractors brings to the table. In the ensuing oral presentation, care must be taken to assure a smooth, coordinated presentation from these people from different companies who may not know each other very well.

Evaluators may, understandably, view a disjointed and unclear presentation as an indicator that this team will be unable to perform the terms of the contract. Evaluators from the Government have a responsibility to get the "best buy" for the taxpayer's dollar, and may, at least subconsciously, see a correlation between the effectiveness of the team's presentation and how the consortium will accomplish the requirements stipulated in the RFP.

Certain key questions will be in the minds of Government evaluators:

- What is the chemistry between and among team members?
- Does the team have a clear vision of what the Government wants accomplished, or does the presentation suggest the team is still trying to figure out what is required by the RFP?
- Do the skills of the different companies and individuals complement or clash?
- Is the prime contractor really in charge, or does there appear to be some prima donnas among the subcontractors, suggesting later friction?
- Does the presentation demonstrate that the consortium has the experience to accomplish the project required by the RFP?
- Is there a willingness of team members to accept Government oversight or an attitude of "give us the contract, then get out of the way?"
- Most importantly, does the company/consortium seem genuinely interested in, and demonstrate proven capability to solve, the Government's RFP-expressed problem?

Technical experts placed in the position of making the oral presentation must strive to demonstrate they are a confident, competent, and coordinated team. Forging this unity and cohesiveness is achieved with thorough planning and rigorous preparation.

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The more teams practice converting text and ideas into persuasive visuals, the better they get—over time, technical staff begins saying things like "let me show you" and drawing their solutions on a white board or piece of paper.

Designing a graphic template in the early stages of the proposal ensures your proposal is consistent, builds trust, and eliminates the need for a lengthy (and costly) formatting pass.

(Graphics Guru...Continued from page 3)

Once the process is explained, the means to convert text and ideas into persuasive visuals is easy and less daunting. The more they do it, the better they get. I find that over time, the technical staff begins saying things like "let me show you" and drawing their solutions on a white board or piece of paper. (There is absolutely no need for the conceptualizer to be Michelangelo. Stick figures and crude representations—with a quick explanation—are perfectly acceptable when communicating their concepts.)

How do I get my technical staff to communicate to the proposal staff what they would like to see in a graphic?

I use P.A.Q.S. (see previous answer) to "interview" the SMEs if they are unfamiliar with the process. Assuming they know more about the customer than I (if not, I get the answers to audience-specific questions from those who are most knowledgeable about the customer), I ask variations of the following questions:

- What is the primary objective of this graphic?
- Who is your target audience?
- What do you know about them?
- What is their goal?
- Are they technically proficient with the subject matter?
- What questions must be answered for the customer to achieve the primary objective? (What are the answers to your audience's questions?)
- Why does the audience care about this?
- What is unique about it?
- What is the direct benefit to the audience for each of these discriminators?

The number, order, and flow of the questions are dependent on the type and complexity of information, knowledge of the technical staff, time available, and my needs. Asking these questions ensures that the SMEs are thinking about the graphic in a way that syncs their knowledge with the customer's wants and needs—instead of an explanation of what they know.

Budgetary constraints make it important for our organization to get the most out of each graphic. What can I do to get a winning graphic at the lowest cost?

There are two strategies I highly recommend.

First, leverage your existing graphics by creating a searchable library. Typically, your company has an existing process, tool, and/or approach for handling each topic discussed in the proposal. Your company also has past proposals that are perfect for finding old graphics that work. The content and design of the graphics will need to be tailored for the current proposal, but referencing or starting with a depiction that has worked in the past is a smart move. Most authors struggle with thinking graphically. Attempting to develop the solution with no more than a blank sheet of paper or screen is unnecessarily challenging and time consuming. Instead, start with an existing image of a solution that was successful in the past. Doing so will save hours and reduce stress, and the solution will be more thoughtful (benefiting from the evolution of the ideas/image as the graphic is passed from one proposal to the next). Picasso once said, "good artists copy, but great artists steal." In other words, be smart and use what others before you have learned.

Second, evolve your concept before rendering the final graphic. Proposals require long days with light resources. If there is little time or money to evolve the graphic, the author should ensure that the idea is as far along as possible by reviewing the concept with the other SMEs/authors or the Volume Lead to verify that it answers the addressed question before assigning it to the designer. In turn, the designer should learn all that he or she can about the concept before creating the final rendering. The designer should sketch the solution first and present it to the author for approval. To ensure agreement on the graphic, the author should then get approval from the other SMEs/authors/Volume Lead. If they agree, the graphic can be rendered. If not, tweak the graphic on paper until everyone agrees. If they have edits, the sketch is tweaked until the visual representation of the solution is approved. The graphic is now ready to be rendered on the computer.

The iterative process of proposal graphic development is necessary, but costly and time consuming. By evolving the concept using simple sketches, you will save significant time and money, and also find that the team's brainstorming sessions will be more organic and productive since the process is real-time (or close to it).

There are four more strategies that have worked for other organizations.

Make your designers part of your team. Invite the designer to team meetings to help them understand the content and objectives of the proposal. This will help them render clear, communicative, compelling graphics that speak to the customer.

Storyboard. Get everyone on the same page as early as possible before you begin laying out pages or slides.

Use a template. Design a graphic template in the early stages of the proposal before layout and design

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The iterative process of proposal graphic development is necessary, but costly and time consuming.

(Graphics Guru...Continued from page 7)

begin. Doing so ensures that your proposal is consistent, which builds trust, and eliminates the need for a lengthy (and costly) formatting pass.

Make the graphics customer focused. Many proposal graphics are deleted because they did not focus on what the customer wants and needs.

For more information, see the article "Getting Graphics Right the First Time" in the Fall/Winter edition of the *Journal of the Association of Proposal Management Professionals* at www.apmp.org.

Coming in the Fall 2007 APMP-NCA *Executive Summary...*

Should I use photos or clip art or both?

3 Secrets to Success Using Graphics

Judge a book by its cover. Proposals have been won and lost because of covers. A well-designed cover that focuses on the potential/current costumer's benefits or addresses key issues plays a significant role in the final decision.

Benefits, benefits, benefits! Use **"**benefits boxes" or "takeaways" on your pages or slides to list the benefits to your potential/current customers.

Color influences. Color quickly affects our emotions. If your goal is to ramp up sales, use your potential/current customer's colors. Your customer wants to see themselves in your proposals. If your goal is to increase mindshare, use your company's colors.

Low on time and money? Use *iStockPhoto.com* and *Dreamstime.com* for royalty-free, print-resolution, professional graphics for about $3 each!

Mike Parkinson is a partner at 24 Hour Company specializing in bid-winning proposal graphics. His Billion Dollar Graphics web site (www.BillionDollarGraphics.com) shares best practices and helpful tools with proposal professionals. Contact Mike at mike@24hrco.com.

Should You Write the Executive Summary First or Last?

Carl Dickson

Should you write the Executive Summary first and build your proposal to support it, or should you write it last, as a summary of all the material developed in writing the proposal? There are good reasons for taking either approach, but which is best for you will depend on your circumstances and goals.

Why You Should Write the Executive Summary First

The purpose of a proposal is to persuade the reader to follow your recommendations. The proposal must articulate and support the reasons that will persuade the reader. A successful proposal is built completely around your rationale. You must know and be able to articulate this rationale before you even start to write the proposal. If you just start writing the proposal and develop your rationale as you write, your proposal will miss many opportunities to be persuasive, and the reasons why the reader should follow your recommendations will never be fully integrated.

Writing the Executive Summary first forces you to articulate your rationale and develop the elements of persuasion. It then provides you with a foundation to build that rationale into the rest of the proposal and enables you to achieve a fully integrated presentation.

Like many things in life, the best approach for you will depend on your circumstances...only don't hold off too long, or you will run out of time.

Why You Should Write the Executive Summary Last

You learn a lot as you develop your proposal. On the last day of production, you know far more about what is required to win than you did on the first day. It is a tremendous challenge to gain this insight before it is too late. The Executive Summary that you can write on the last day will always be different from the Executive Summary you would write on the first day. If you build your proposal around what you know on the first day, you will be building your proposal around incomplete knowledge.

While you could argue that starting early and doing your intelligence gathering homework is the best way to respond, you will never have full knowledge at the beginning. This is true, if only because of the RFP. Going through the RFP, item by item, and developing your solution and your response teaches you things. The strategies that were developed before the RFP was released often need to be changed or even dropped based on what is in the final RFP. And even if you are really diligent about reading the full RFP as soon as it comes out, you won't have a full understanding of all the implications until you've fully developed your solution, written the response, and gone through all the related pricing trade-offs.

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Proposal video could include interviews with past contracting officials discussing a contractor's past performance—likely strengthening believability of the written summary.

Access to and use of media from cell phones, digital video, and social gathering spots like MySpace and Face-Book makes many staff more likely to be camera-ready.

(President's Corner...Continued from page 1)

What will our proposals look like in the years to come, and what opportunities does the electronic proposal medium provide?

I recently viewed a U.S. Army display that demonstrated how low-volume music piped into a soldier's headset, when out in the field, provides psychological support without compromising communications to and from command. Similarly, more and more Web ads have soundtracks, sometimes dubbed with narration. Could a soundtrack, played at the discretion of the evaluator, improve the review experience?

Think about it. You wouldn't vote for the next *American Idol* if you couldn't hear contestants sing and dance. So why not have audio/video links in the proposal that would feature a Project Manager discussing her qualifications for the position or a Transition Manager discussing his plans for the first 30 days of the contract?

And what about the "boots-on-the-ground" employees—those individuals critical to performance of the work? Seeing actual Help Desk or Call Center staff in action speaks volumes about an organization's ability.

Now, I'm not suggesting "song and dance" as a way to gain business, but it stands to reason that a proposal evaluator might appreciate the interviews, work demonstrations, and site tours you just can't fully convey by written word alone. Seeing and hearing proposed key personnel and facilities could provide a compelling reason for selection—or non-selection.

Traditionally, the evaluator reads the proposal, interprets the information, and gives it a score. By adding audio and video, additional information is provided, and the proposal ante is raised.

Right off, you may be thinking your proposed staff may not perform that well in front of the camera. While there will likely be some staff who need some coaching (and cajoling), it's important to note that younger workers have a different take on the matter. Their access to and of media from cell phones, digital video, and social gathering spots like MySpace and FaceBook makes them more likely to be camera-ready. Remember, these folks have been captured on tape since birth.

Proposal video could also include interviews with past contracting officials discussing a contractor's past performance. Such interviews are likely to strengthen the believability of the written summary. A follow-up phone call to the reference could generate better questions by the evaluator and a better understanding of the contractor's performance.

Another possibility—and just imagine the punch it could add to your proposal—would be to add video of your company receiving a performance-based award from the Government. Next time your company is to be honored by the Government, be sure to bring the camera.

Animation and slide shows included in the proposal could also help by illustrating a contractor's approach and solutions. An animated project schedule would effectively convey various tasks and use of resources. These visual presentations could well mitigate the problems that plague the task of conveying abstract concepts.

Your proposal could also provide links to work samples. For example, if technical writing service is the basis of the solicitation, the evaluator could link to a previously published technical manual available as a PDF file.

Does any of this sound too far fetched? Well, I've been adding hyperlinks to my proposals for the last several years. I'm ready to fully embrace the creativity that the electronic proposal provides.

Perhaps this is the beginning of the role I coin "Proposal Producer." In addition to being skilled in all of the traditional proposal-management skills, a Proposal Producer will be skilled in the planning and production of audio, video, and other communication vehicles. Though it will require current Proposal Managers to develop skills, the rewards will be worth it. Proposal Coordinators will also have to learn e-content management and placement.

New proposal development tools can be designed to help the Proposal Producer and her team. Existing proposal software has already made the virtual work space a reality. New tools will help the integration of audio and video into proposals.

Though the Federal Government will have the ultimate say on the type and kind of content it wants to evaluate on bids, it's still exciting to consider how new media will likely make a dramatic change in future proposal development.

Lights, camera, action!

According to the Comptroller General, the protestor had the burden to prove that the time stamps on the emails were not accurate.

One of the legal requirements for correcting a "mistake" in a proposal is that the offeror be able to show what the intended proposed price actually was.

(Legal Corner...Continued from page 5)

Symetrics' computer mail server records showed that Symetrics had commenced transmission at 14:55:42 p.m.; the intended recipient had been identified and located at 14:55:44 p.m.; Symetrics' transmission to the destination was identified as complete at 14:58:30 p.m.; and, finally, Symetrics' mail server returned a message: "SMTP session successful" at 14:58:31 p.m.

The Government's email relay report showed Symetrics' FPR was accepted at the server at Wright-Patterson Air Force Base, Ohio at 2:57:41 p.m. and delivered to the contracting officer's email box at 3:01:00 p.m., and that the process was completed at 3:01:00 p.m. Based on these facts, Symetrics argued that the rejection of its FPR was unreasonable because it was within the control of the Government by the deadline for receipt of FPRs. In denying Symetrics protest, the Comptroller General found that the solicitation clearly required the FPR to be delivered to the contracting officer by 3:00 P.M. In the case of an email submission, this had to mean the contracting officer's mailbox. The Comptroller General also rejected the protester's argument that as a "matter of science" there must be some time gap between the Government server's queuing of the email for delivery to the contracting officer's account and the report of delivery at 3:01:00 p.m. As such, the protester argued, if the Government's server reported delivery at 3:01:00 p.m., delivery must have been completed prior to that time. The Comptroller General explained that the protestor had the burden to prove that the time stamps on the emails were not accurate, and it did not meet that burden.

What electronic work papers are part of the proposal?

Another recent bid protest in effect raised the question of whether the formulas embedded in a spreadsheet are part of an offeror's proposal. The question arose because an offeror, ERS-JV, attempted to adjust its bid price upwards as a result of a claimed mistake. One of the legal requirements for correcting a "mistake" in the proposal is that the offeror be able to show what the intended proposed price actually was.

ERS-JV's explanation for its alleged mistake was as follows. Its director had ignored the formulas set up in the spreadsheet and overrode the automatically "calculated" total amount for the base requirement by inserting, instead, a "non-calculated" (that is, not calculated by the formulas) amount, whereas he actually intended for the amount to be the "calculated" amount, the very same amount he had overridden. Likewise, the director had ignored the formulas set up in the spreadsheet and overrode the automatically "calculated" amount for the option requirement by inserting, instead, a "non-calculated" amount, whereas he actually intended for the amount to be the "calculated" amount, i.e., the amount he had overridden. In short, ERS-JV was in essence claiming that its real bid price was the amount determined by the formulas, an amount that the Government could verify, and not the amount shown in the paper version of the proposal.

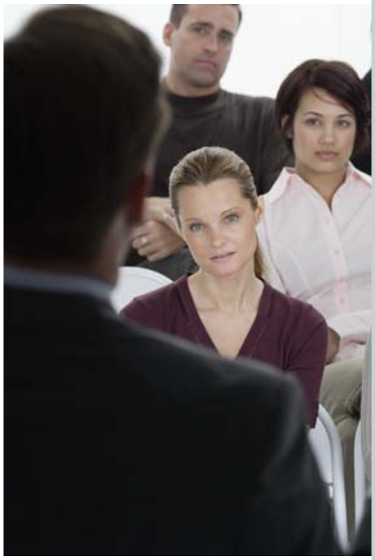
The Government accepted ERS-JV's arguments and "corrected" the bid, but the Comptroller General found that this was unreasonable. The Comptroller General explained that, in view of the automated features of the spreadsheet, which are readily apparent from its electronic version, the offered explanation was illogical and raised several questions the offeror did not answer. The ERS-JV director did not explain why he had ignored the formulas set up in the spreadsheet and overrode the automatically calculated figures. He did not explain the discrepancy between that intentional act and his later claim that the figures he overrode, calculated by the formulas he ignored, were, after all, the intended figures. He did not explain the derivation of the non-calculated figures or why he had inserted those particular figures. He did not explain why he did not realize an error had been made as soon as he inserted the "non-calculated" amounts, even though, with respect to the option requirement, this action automatically resulted in insertion of a negative number in the total direct cost cell, in plain sight next to the total dollar amount cell on the computer screen before him. Accordingly, the Comptroller General concluded that the questions raised by ERS-JV's incomplete explanation cast doubt on its claim that there had been a mistake at all.

When is a contract formed?

It is a fundamental rule of contract formation that a binding agreement is created by an offer and an acceptance. Furthermore, the party that is demanding performance of a contract must have given some "consideration" for the performance, typically, a promise to pay, but sometimes a counter-performance or the waiver of a valuable right. Additionally, the offer, acceptance, and consideration must have originated from individuals with authority to bind their respective parties.

Because of the relative informality of email, many users do not realize that their written words may nevertheless satisfy the requisite legal formalities for creating a contract. As a result, a party could be held to have breached a contract for not following through on the promises contained in its email communications.

(Continued on page 11)



Send your suggestions for Professional Day speaker topics today to Bob Lohfeld at rlohfeld@lohfeldconsulting.com.

(Professional Day...Continued from page 1)

confident in achieving that goal. But, that also means fulfilling certain objectives.

Volunteers are always needed for the committees. If you are interested and eager to provide some time and good ideas, please contact the subcommittee chairperson of your choice:

- **Publicity –** Pat Kent (240.333.1105, pat.kent@techteam.com)
- **Logistics –** Linda Mitchell (703.439.5856, linda.mitchell@unisys.com)
- **Catering Services –** Nasra Sakran (301.996.6736, NservicesS_us@yahoo.com)
- **Exhibitors and Sponsorship –** Amy Barden (703.820.0075, abarden@lohfeldconsulting.com)
- **Speakers –** Brenda Crist (240.333.1137, bcrist@techteam.com)

Topics! Have you sent us your suggestions for speaker topics? If not, please do so today. Knowing what topics are the most germane to you, the proposal professional, is vital to our speaker selection. Email those ideas to Bob Lohfeld at rlohfeld@lohfeldconsulting.com.

Speaker selection is definitely a key element for Professional Day's success. Our chairperson for this subcommittee is Brenda Crist, and she and her subcommittee will be recruiting the "cream of the *speaker* crop" to ensure our having outstanding presenters to complement the selection of topics.

Exhibitors are always essential to making Professional Day exciting and informative. If you are a corporate sponsor and want to participate, or if you have some ideas about who you would like to see at this year's event, please call Amy Barden at 703.820.0075 or email her at *abarden@lohfeldconsulting.com*.

How Do I Join the NCA Chapter?

It's easy to join the National Capital Area (NCA) Chapter, and it's free. If you are just joining APMP (www.apmp.org/siteSpecific/customer/register_accountData.aspx), simply note on the APMP application that you wish to affiliate with the NCA Chapter. That's all you need to do—APMP will provide your information to NCA, and we will include you in our mailings.

If you are currently an APMP member and want to join the NCA Chapter, simply go to www.apmpnca.org/affiliate.html and complete the online form.

With almost 600 members, NCA is APMP's largest chapter. Joining NCA allows you to learn about our latest networking and presentation events. Best of all, it's free.

(Legal Corner...Continued from page 10)

The opposite situation can arise, as well, i.e., where a party thinks a contract has been formed by an exchange of emails, when really no contract exists at all. Such was the case in a recent dispute before a North Carolina state court. The builder's project manager had sent the owner an email stating that the cost of revisions to the project's air-conditioning design would be worked out between the architect and the builder, with no cost to the owner. Subsequently, the builder sought payment from the owner for that same work. The owner defended on, among other grounds, the builder's email that had promised to perform the work at no cost to the owner. The court rejected this argument, however, finding that the owner had given no consideration in exchange for the builder's unilateral email, and therefore no binding obligation for the builder to work for free had been created.

Offerors who take care to play by the rules will continue to have the advantage over those offerors who lack these key organizational skills.

Conclusion

In this age of technological change, proposal and procurement professionals can take heart in knowing that the basic ground rules with which they are familiar have not changed. Offerors who take care to play by the rules—making sure their proposals say what the offeror meant them to say and are prepared, reviewed, and delivered in an organized and timely manner—will continue to have the advantage over those offerors who lack these key organizational skills.

Shlomo D. Katz is Senior Counsel in the Washington, DC office of the national law firm of Epstein Becker & Green, a Corporate Sponsor of APMP-NCA. If you have any questions about these or other proposal issues, please contact him at (202) 861-1809 or skatz@ebglaw.com.

The RFP should, to the degree possible, be read from the Government's perspective. The Government has written the RFP to solicit a solution to a problem and is looking to the private sector for that solution.

Many companies wait until the lengthy written proposal has been submitted to start thinking of the orals. This leads to a hurried pulling together of these "nuggets" into an oral presentation.

(Oral Presentation...Continued from page 6)

Introducing the "Team." Because of strict time limits imposed for oral presentations by the RFP, many presentation teams tend to jump immediately into the substance of their presentations by immediately "answering the mail" requirements of the RFP. While this is understandable, it is also a mistake.

Evaluators are human beings, and want to know about the consortium of companies presenting and the individual presenters. This is especially so for small companies without a "brand" name. For example, an IT firm that started up in the dot.com boom of the 1990s, and is still flourishing in 2006, is a story worth telling. It sends the signal to the evaluators that this company is resourceful and operates on a solid business model.

The lead presenter should in his/her opening remarks provide a brief profile of each presenter, highlighting the skills and experience of these presenters as they relate to the RFP requirements. In effect, this permits the presenters to "shake hands" with the evaluators and make them comfortable with the prospect of working with this consortium of companies. This is where you fuse the macro—the companies and their history of accomplishing requirements for the Government similar to what is required by the RFP—and the micro, where the evaluators learn about the individual skills and personalities of the presenters.

Competing Against Incumbents

One of the most difficult challenges for any company or team of companies responding to an RFP arises when one of the companies competing is the incumbent already doing the job. How does this situation come up? It could be that the contract originally won by the incumbent was for a fixed period, and it must now be awarded anew.

The incumbent has every right to submit a proposal, and it has the advantage that it is intimately familiar with the Government's requirements. It is also "on the ground" performing the work.

Factor in that the evaluators are Government employees who are risk-averse. They will make the same money each month no matter which company is awarded the contract. Even if the Government agency is not completely satisfied with the work done by the incumbent, the evaluators may still be reluctant to make a change. Doing so could make them vulnerable to criticism that they "changed horses in mid-stream" and caused harm to the Government by so doing.

Does this mean a company should not compete against an incumbent? Not at all. If the proposal and the oral presentation succeed in making a compelling case for change (especially if intelligence can be gained as to the weak elements of the incumbent's performance), then a company certainly has a good chance of winning.

Just realize that in such a situation, the "new guy" is not playing on a level field—some companies (incumbents) are simply "more equal" than others.

Winning Through the "Three P's"

The heart of my presentation skills workshops, and the essence of this brief essay, is what I call the Three P's—*Planning, Practicing*, and *Presenting*. I use this teaching model for both corporations and Government agencies. It is a flexible model that can be adapted to situations ranging from presentations to supportive audiences to those made to hostile groups that would rather jeer than cheer. It is particularly adaptive to the unique requirements of the oral presentation for a Government contract.

1. Planning

The oral presentation must be consistent with the written proposal. Evaluators will have scrutinized the written document, which undoubtedly will have provoked many questions.

When the proposal is being written, I believe it a good idea to have those who will be presenting the orals to be looking over the shoulders of the writers so they can extract "nuggets" of relevant information to be included in the orals.

Unfortunately, many companies wait until the lengthy written proposal has been submitted to start thinking of the orals. This leads to a hurried pulling together of these "nuggets" into an oral presentation. Combined with selecting (per the RFP) who the presenters will be, the result can be a hurried drafting that may not accurately reflect the written proposal. If the presenters are working jointly with the writers, a more efficient, thematically consistent oral presentation will be the result.

The RFP should, to the degree possible, be read from the Government's perspective. The Government has written the RFP to solicit a solution to a problem and is looking to the private sector for that solution. The Government agency also believes it has the ultimate responsibility to the taxpayers and probably will not look kindly at the consortium that appears resistant to oversight. In effect, read the RFP as if you are a Government agency looking for help. If, instead, you read it from the perspective of what you wish to do, you'll probably not make the cut.

Involve senior management to gain commitment of resources/personnel. Both the prime and the subcontractors must be willing to expend resources

(Continued on page 13)

If possible, the entire team should visit the room where the presentation will be made before the big day. Observe where evaluators will sit, where electrical outlets are located, and where easels or flip charts are located.

The principle obstacle to developing a question-anticipating simulated presentation is imagination and willingness of team members to take hard hits in practice so they are more effective in the actual orals.

(Oral Presentation...Continued from page 12)

necessary to win the contract. This commitment must be made by senior management of all involved companies, and include making key experts available when required for brainstorming and practice sessions, even during the June–August vacation timeframe.

Develop an overall theme that is responsive to the RFP. Think of this theme as the lead paragraph in an article in *The Washington Post* describing the program to be undertaken. Seek focus and thematic unity, centered on what the Government wants accomplished. When this theme is developed, all presenters must coordinate their presentations with this theme to produce clarity, cohesiveness, and consistency.

2. Practicing

Get professional help. The purpose of the Government's emphasis on oral presentations is to have the people with in-depth knowledge make the presentation, not polished speakers who possess less-detailed knowledge of the RFP requirements. Still, the team of experts making the clearest and most professional presentation certainly increases its prospects of winning the contract. An outside speaking coach should be brought in to show the technical experts how to make a coherent and effective presentation that focuses on the Government's needs.

In addition to providing knowledge of the speaking art, this coach can be much more frank in providing constructive criticism to presenters than will co-workers, who, wanting to maintain positive working relationships, may be "kinder and gentler" in their critiques of presentations in the various "Murder Boards" (see below). The coach's objective is to blend the techniques of effective presentation skills with the expertise of the presenters. The fusion of these two elements produces contract-winning presentations. (Modesty precludes me from making a specific recommendation as to whom this coach should be!)

Developing PowerPoint slides. You will have started developing your PowerPoint slides during the *Planning* phase, but it is during the *Practicing* phase that you will refine them. A complicating factor presented in many RFPs is the number of slides permitted. I worked with a company once that had 90 minutes to deliver their presentation, but was limited to 20 slides. Another problem arises when the RFP requires all visuals to be delivered prior to the actual date of the oral presentation. A solution to this problem is presented below. Have one person coordinate preparation of the slides, ensuring consistency. It is advisable to have the visuals prepared by a professional graphics company with oversight by the competing firm's specialist.

Conduct a series of Murder Boards. Although the "Murder Board" sounds like something Tony Soprano might convene, it has nothing to do with a criminal act and everything to do with becoming a better public speaker and a more persuasive presenter when competing for a Government contract.

The Murder Board is a realistic simulation of the actual oral presentation to be made. Colleagues role-play the Government evaluators, asking the types of questions these people are likely to ask. It allows presenters to make mistakes when they don't count, increasing the odds that they will shine when the actual presentation is made.

The Murder Board is the presenter's version of the actor's dress rehearsal, what lawyers do in preparing a witness to face cross-examination in a trial, and what the flight simulator is to the pilot. Just as with the actor, the witness, and the pilot, this simulation permits presenters to learn from their mistakes so that the actual presentation is (1) more responsive to the informational needs of the audience, (2) answers are developed for likely questions to be asked, and (3) overall speaking confidence and competence are enhanced.

When preparing for an oral presentation for a Government contract, a Murder Board will enable the presenting team to visualize the presentation in advance. Proficiency in speaking and self-confidence are increased by this meticulous practice. Public speaking ranks high in the pantheon of phobias because of apprehension that one is going to be embarrassed by not being able to answer questions from the audience. Add to this the pressure on presenters vying for a Government contract with millions of dollars—and perhaps their jobs—on the line, and the need to practice is obvious.

The success or failure of a Murder Board ultimately depends on its realism. The closer it is to the real thing, the better prepared the presenters will be. This realism, to a great degree, depends on the ability of colleagues to get into the heads of the Government evaluators. This does not mean having a great gift for acting or mimicry; it does mean trying to think like these evaluators. Consequently, intense efforts must be made to acquire as much intelligence as possible on the evaluators and the needs of the agency they represent.

If team members can anticipate evaluators' questions, they can then develop answers ahead of time. Think back to when you were in college or graduate school. Your GPA would probably have been higher if you could have seen the questions before the final exams. The Murder Board provides presenters a look at the evaluators' probable "exam questions." The principle obstacle to developing a question-anticipating simulated presentation is imagination and willingness of team members to take hard hits in practice so they are more effective in the actual orals.

(Continued on page 14)

Use two video cameras during your Murder Board—one to capture individual performances and one to tape the entire presentation, including the "choreography."

(Oral Presentation...Continued from page 13)

Some presenters will resist participating in such intense practice sessions, saying they do not require such "play acting." These confident (or fearful) people should be reminded of Albert Einstein's words, "What a person does on his own, without being stimulated by the thoughts and experiences of others, is, even in the best cases, rather paltry and monotonous."

If Einstein believed he needed outside stimulation for his best work, perhaps these reluctant presenters can be convinced they may benefit from the crucible of the Murder Board. The various Murder Boards (and there should be several) should be videotaped, and the videotapes critiqued with little mercy on the premise that it is better to have mistakes pointed out in practice by colleagues than have them noted by evaluators, thus jeopardizing the chance to be awarded the lucrative contract. Follow the five areas below so that an effective Murder Board will pay off in the actual orals.

1. ***Employ two video cameras.*** All Murder Board practice sessions should be videotaped to enable presenters to gauge their individual performances and how the team presents as a whole. Consequently, employ two video cameras. One will tape the entire presentation, including the "choreography" of how presenters pass the baton to the next presenter. The other camera can then videotape the individual presentations, so the presenters can review their performances individually.

2. ***Hone the delivery skills of all speakers.*** The purpose of the oral presentation is to transmit, clearly and persuasively, the vision of the consortium as to how it intends to accomplish the RFP-expressed requirements. The technical experts making the presentation will concentrate on the *What* of the presentation, while the outside coach provides valuable insight into *How* the speakers communicate their ideas to the evaluators. Poor eye contact and body language, as well as poor vocal inflection, especially monotone delivery and "uh's" and "Y'knows," can negatively impact the way a message is received. We like to think the lucidity of our presentation is more important than how we look and sound. Research has shown, however, the importance of non-verbal communication on perception of messenger and message. The outside coach earns his or her keep in showing how to blend *substance* with *style*.

3. ***Don't read from a script***. One of the greatest speaking errors of people not accustomed to presenting is to read from a script. Little eye contact is made with the audience, and the thought may occur to the evaluators that this person is reading words written by someone else. Note cards—3x5 cards are best because their size precludes writing too much—with memory joggers can certainly be used, but speakers should show they "own" the material.

4. ***Don't read the visuals.*** The evaluators are literate and do not need you to read the words on the screen. Few things alienate people more in any audience than to have the speaker read verbatim the words on the visuals. Speakers should reduce to a minimum the text on the visuals during the various Murder Boards. To avoid falling into the "reading from the screen" trap, try this drill. Position yourself with your feet pointing at the audience and at such an angle from the screen that turning to read will cause you discomfort. Don't make the pivot; keep those feet pointing toward the audience.

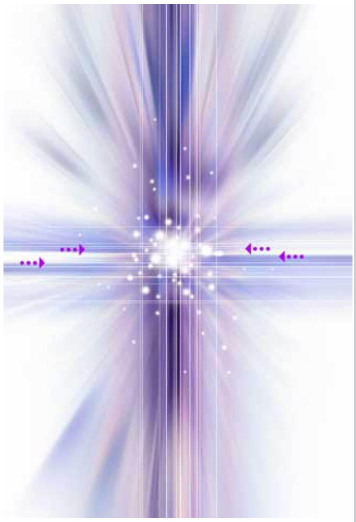
5. ***Use rhetorical devices to reinforce your message***. Use of rhetorical devices can add impact to the intellectual content of the message, as well as increase retention by the audience. Start using them in the practice sessions, and you'll be quite comfortable in the actual presentation. Repetition of key points, done adroitly in cadences of three, has a remarkable ability to cause audience members to remember the speaker's remarks. The *pause*, especially if it is used as a substitute for "uh" and "Y'know ," likewise tends to reinforce the speaker's words and message. In my workshop, I put special emphasis on learning these and several other techniques I call "shortcuts to eloquence." Even inexperienced presenters, when they add these weapons to their speaking arsenal, will appear polished and articulate.

You need to conduct a Murder Board for the same reason that professional football teams, despite having injured players who could benefit from a rest, go through physically demanding practice sessions before the next game. These athletes and their coaches realize the team will be better prepared by having practiced against what the coaches have anticipated through scouting reports—the game plan of the opposing team. A team vying for a Government contract must follow the same logic.

You need to conduct a Murder Board for the same reason that professional football teams, despite having injured players who could benefit from a rest, go through physically demanding practice sessions before the next game.

Solve the "early visuals" problem. If the RFP stipulates that visuals must be delivered early, the potential problem of having the thinking and recommendations/solutions "frozen" to the visuals already sent to the Government agency must be taken into account at the outset. When the visual are being "built," they must (1) have the specificity to permit the evaluators to follow the presentation's general theme, main points, and recommendations, and (2) be sufficiently broad in scope to permit "fitting" in new ideas generated after slides have been submitted.

(Continued on page 15)



Be ready for the little problems created by visuals, as Murphy's Law has not been repealed.

Unless evaluators say they wish to direct their questions to specific team members, the team leader should quarterback the Q&A session, directing questions to team members according to their respective expertise.

(Oral Presentation...Continued from page 14)

3. Presenting

"Case the Joint." If possible, the entire team should visit the room where the presentation will be made before the big day. Observe where evaluators will sit, where electrical outlets are located, and where easels or flip charts are located (if permitted by the RFP). If the room lacks curtains/blinds, will sunlight at the time you are scheduled to present wash out the visuals? Because you do not wish to wash out visuals or plunge the room into total darkness, can lights immediately in front of a built-in screen be turned off separately? If driving, determine the traffic and parking availability at the time you will be arriving for the presentation. It might be wise to have the presenting team stay at a nearby hotel the night before the presentation.

Bring your own projector (and screen if necessary). Projectors vary in how they operate. A team that shows up with its own projector (and a spare bulb) sends a signal that it "has its act together," and certainly will know how the projector works. Conversely, a team that does not know how to operate the Government's projector, or that is faced with a blown projector bulb, will appear unprepared. Be ready for the little problems created by visuals, as Murphy's Law has not been repealed. Bringing your own portable screen will permit you to avoid being forced to project your visuals on a built-in screen in front of a bank of lights.

Handling the "I forgot what I was going to say" problem. One of the reasons that speaking in front of a group is the number one fear in America is the certainty many people have that their mind will go blank at a critical time. That is why so many make the mistake of reading their presentations. You can control this fear with just two 3x5 cards. On one card place an anecdote, quotation, or statistic relative to the problem posed in the RFP. On the second card, place an outline of your presentation. If your mind goes blank, merely reach for the two cards together, and relate the information on the first card. You will probably recover from your temporary amnesia. If not, slide the second card to the front, and use it to see where you should pick up. The cards are "life preservers" when you are drowning in panic.

Beware the perils of PowerPoint. If you are allow to use PowerPoint or a similar program, don't let yourself or your team be carried away by using all the bells and whistles available. Keep these visuals as simple as possible so you gain the advantage they provide, while avoiding having the brilliance of the visuals overwhelm the substance of the presentation. You want the audience to remember your recommendations, not how arrows flew in from different sides and your "creative" use of colors. Above all, seek to keep the visuals clean, consistent, and professional.

Stand while presenting. Inexperienced presenters will prefer sitting while making the presentation. It may be more comfortable, but the presenter who stands has better presence, better voice control, and better eye contact. All Murder Board presentations should be made standing to help presenters get used to "being on stage."

When evaluators fail to make eye contact. It can be disconcerting to find evaluators failing to make eye contact. It could be that these evaluators are busily taking notes, or they are looking only at the slides, or they wish to limit "human contact" so as not to be swayed by the personalities of the presenters. In any event, presenters should continue to look at the evaluators.

The Question & Answer (Q&A) session. The RFP generally calls for a Q&A session for clarification purposes after the formal presentation. Unless the evaluators say they wish to direct their questions to specific team members, the team leader from the prime contractor should quarterback this session, directing questions to team members according to their respective expertise. The stress level on presenters will probably be less during the Q&A session because it will take place within the more familiar conversational context. But don't be lulled into a false sense of comfort.

Practice Q&A sessions should be an integral part of the Murder Boards so as to anticipate the types of question likely to be asked. The Q&A session is where the evaluators' doubts and questions can be resolved, key points can be driven home by the presenters in their answers, and the confidence level of the evaluators with the ability of the team to "do the job" can be increased.

When a small company, responding to a "small business set aside," has a large corporation as a subcontractor, evaluators may ask if the small firm is actually "fronting" for the big company, thereby allowing the bigger company to get a piece of the lucrative "set aside" pie. The small prime must be prepared to document convincingly that it sought the larger firm to subcontract a portion of the RFP and that it was not "recruited" by the large firm. If done adroitly in the Q&A session, this can actually work to the advantage of the prime, as evaluators may see the leveraging advantage of having a corporate giant's "reach" being applied to the "small business set aside."

Some Final Advice

The information included in this brief essay is a bare bones outline of the training in my workshop.

(Continued on page 16)

"Those who can think, but cannot express what they think, place themselves at the level of those who cannot think." –Pericles

(Oral Presentation...Continued from page 15)

Despite its brevity, the advice provided will help companies deliver more effective, persuasive presentations. Two statements, written many centuries apart, underline the eternal importance of speaking skills.

In his 1984 autobiography, Lee Iacocca wrote,

About 2,500 years before Iacocca's observation, the great Greek statesman Pericles wrote, "*Those who can think, but cannot express what they think, place themselves at the level of those who cannot think.*"

Iacocca and Pericles have a warning for companies competing for contracts. "Terrific ideas" can easily be trumped by those who can "express what they think." If your competitors are improving the presentation skills of their technical experts because of the importance they attach to oral presentations, while you rely on your "superior" ideas, programs, and experience, you may find your firm losing millions of dollars. A small investment in presentations training, therefore, can pay large dividends when lucrative contracts are awarded.

Larry Tracy has been cited as one of the top speech coaches in the U.S. His web site (www.tracy-presentation.com) has been at the top of Google since September 2004 for "Persuasive Presentations." He was hailed as "An extraordinarily effective speaker" by President Ronald Reagan. He now conducts presentations training seminars, including preparing companies for oral presentations for Government contracts. His book, The Shortcut to Persuasive Presentations, *has been the primary textbook for Academic Year 2006-2007 for the "Oral Presentations" Course at the Center for Leadership Education at Johns Hopkins University.*

"I've known a lot of engineers with terrific ideas who had trouble explaining them to others. It's always a shame when a guy with great talent can't tell a board or committee what's in his head."
–Lee Iacocca

Executive Summary

A Publication of the Association of Proposal Management Professionals (APMP) National Capital Area (NCA) Chapter

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(Executive Summary...Continued from page 8)

When you write the Executive Summary last, it will reflect a better understanding of the customer, the solution, and the competitive environment. As a result, it will be more persuasive.

How Do You Decide?

Like many things in life, the best approach for you will depend on your circumstances. If you are having trouble articulating why the customer should follow your recommendations, then doing the Executive Summary first may be an excellent way to start. You can always go back to it later and make changes. If, however, your rationale depends on what your recommendations are, and you won't know until they are developed and priced, you may wish to hold off. Only don't hold off too long, or you will run out of time.

A hybrid approach is to create a draft Executive Summary, with an expectation that it will get thrown out or completely revised as you go through the process and learn more. What I like about this approach is that if you revise it as you go along, you have a baseline understanding of your rationale that you can share with people throughout the process to help foster a shared understanding and illuminate any discrepancies. If you end up revising the Executive Summary on a daily basis, the effort is not wasted. Confirmation, validation, and revision of the reasons why your customer should follow your recommendations can only help you achieve a successful proposal.

Learn more at CapturePlanning.com.

Exciting Update—NCA Job Board

As an added value to our members, APMP-NCA has expanded the posting timeframe of our job board listings. Job postings now run on the board for 90 days. The price per posting is $60. Check out www.apmp-nca.org/redesign/jobs/applicantresults.cfm.

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APMP-NCA May Roundtable Recap—The Blended Bid: Synergizing the Written Proposal and Oral Presentation

Lou Robinson

Getting a good speaker for a Roundtable is a difficult task. There are two required elements—subject matter and presentation quality. It is seldom that we get a person who excels in both. However, for the May 2007 APMP-NCA Roundtable, Larry Tracy was the speaker, and he excelled in both areas.

His subject was the integration of the oral proposal with the written proposal. Companies often do these two proposals independent of one another, and it sometimes is hard to tell they are related.

Larry's presentation technique was dynamic, with great voice inflections, appropriate body language, and a good mix of humor. It is difficult to stay fully engaged with a speaker in the evening after a hard work day, but Larry had everyone's full attention.

In summary, it was a great presentation about a very important proposal subject that was enjoyed by all. The slides from this presentation are now on the NCA web site (www.apmpnca.org/presentations.html). They will be a valuable tool for many proposal teams.

(APMP Conference Highlights...Continued from page 4)

Beth Wingate

APMP held its conference at the Savannah International Trade and Convention Center, which provided greater flexibility for breakout sessions, more space for exhibitors, and the ever-popular APMP Book Store.

Dennis Green

Conference attendees met new colleagues and visited with old friends during breakfast on the first morning of the conference.

Dennis Green

Conference co-chairs Dick Eassom and David Winton updated attendees on upcoming APMP initiatives.

Dennis Green

The NCA Chapter was well represented by Corporate Partner Helane Jeffreys and NCA president Michael Scruggs.

Dennis Green

24 Hour Company *(left to right)* principals Mike Parkinson, Colleen Jolly, Dennis Fitzgerald, and Paul Kay) were recognized for their Gold-level Sponsorship by Dick Eassom, conference co-chair.

Beth Wingate

Savannah's skillful tug boat fleet guiding cumbersome cargo ships was a frequent site during the conference.

(APMP Conference Highlights...Continued from page 18)

Dennis Green

Linda Mitchell and Andy Divine enjoy the exhibitors' showcase area between conference sessions.

Beth Wingate

Conference participants enjoyed staying at the Westin Savannah Harbor Golf Resort & Spa adjacent to the convention center.

Beth Wingate

Historic Savannah, founded in 1733 by James Oglethorpe, provided a beautiful setting for the conference. APMP visitors enjoyed the 21 Historic District Squares filled with live oak trees—the state tree of Georgia—draped in Spanish moss.

Dennis Green

Robert Frey, a 2006 APMP Fellow, shared his 20 years' experience in his presentation on "Getting Your Story Straight: The Path to Blue Team."

Dennis Green

Keynote speaker, Andy Bounds, revved up attendees and shared his secrets to "Win More Business From Your Presentations"—concentrating on the "Afters." Check Andy's book, The *Jelly Effect*, for more details!

Beth Wingate

NCA Board Members Betsy Blakney and Beth Wingate toured historic Savannah sites via horse-drawn carriage. Savannah is known as America's first planned city.

Beth Wingate

Conference attendees were "treated" to 4:30 a.m. wake-up calls from the horns of huge cargo ships plying the Savannah River.

Mark Your Calendar for 2007 APMP-NCA Events

July 18	Roundtable—Mastering the Art and Science of Capture Management
September 19	Roundtable
October 16	Professional Day (held at Northrop Grumman, 12900 Federal Systems Park Dr., Fairfax, VA, check-in begins at 8:00 a.m.)
November 14	Roundtable

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APMP-NCA Board of Directors Meetings Open to Members

The Board of Directors for APMP NCA meets the first Tuesday of every month. Every other meeting is a virtual meeting-telephone conference. These meetings are open, and APMP members may attend.

Anyone interested in the topic is invited to attend our meetings. You do not have to be an APMP member or even a proposal specialist to attend an NCA Roundtable. If you are interested in proposals, business development, and professional development, we'd like for you to join us!