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President's Corner

Measuring Success

Beth Wingate, AM.APMP

Most of us like to know how we're doing—whether it's in our personal or professional relationships or in our daily lives. We spent our childhood through early adulthood being measured by our teachers via exams, essays, and research papers. "Report card day" was either a day of triumph or a day spent with a sick stomach wondering how we would survive that moment we handed over our "measurement of success" to our parents.

As adults, we're measured every day by our job performance, proposal wins and losses, proposal sections, graphics—whatever we get paid to produce. We're measured on the homes we live in, the way we look, the behavior of our children.

"Measuring Success" is the theme of the NCA Chapter's October 14 Professional Day, and it's the theme of this fall *Executive Summary* newsletter. How do you measure success—your own personal success, the success of your teams, the success of everyone you meet?

I distinctly remember the day I received my first performance review. My boss (a very gentle, compassionate soul who must have known how nervous I was) seated me at his conference table, handed the review to me to read, and told me to let him know when I was ready to talk about it as he sat back at his desk and started going through his emails. I read the review carefully and noted each performance rating—"excellent," "excellent," page after page of "excellent"…"good." "Good?!" "Good?!" Oh, no! What did I do wrong? Where did I screw up? My boss went on to tell me what a terrific job I'd done over the year, pointed out many successes, and shared how pleased he was with my performance. I admit I had a hard time hearing his positive words with that nasty "good" flashing in my head like a gigantic neon sign of failure.

With a wry chuckle and rolled eyes I think back to the devastated—and ignorantly conceited—young woman I was when I arrived home that evening, handed the review to my Dad like in the report card days of yore, asked him to read it, and then asked him to take one of our famous "I gotta talk with you about something important" 2-mile walks around our block. My Dad is not an "Oh, poor baby! Let me fix the world for you!" type. He's more the tell-it-like-it-is northwestern farmer who silently lets you spill your guts and then talk yourself into the logical conclusion—with a few ego-piercing questions and comments thrown in to help guide you on your way.

We walked the first mile in silence. As we started the second, he asked me why I was upset. It all came gushing out…"What did I do wrong? I worked so hard! Why didn't I get excellent on everything? What do I do now?" After years of flying around the country helping to sort out and clean up insurance nightmares in hurricane and flood-ravaged areas, Dad was used to quickly coming to the crux of the matter. He told me straight-out that I'd never get "perfect" on any review—in fact I never should—because there was always room for improvement, always something

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"Amtower writes, "I measure myself in two ways: What I think of myself, and what my wife and children think of me."

new I could learn, always some way I could grow my skills and abilities.

That conversation has stuck in my mind for over 20 years. There's always a way I can improve my knowledge and abilities. Twenty years later, I measure my success on every proposal and project by the lessons I learned, the skills I improved, the knowledge I gained—and by how I shared my skills and knowledge with others and helped them to improve their skills and abilities.

I read constantly (and usually have at least four books going at a time), and whether it's the latest business book or a mystery novel, I try to glean lessons from the characters' experiences.

I've read a couple of books lately by our local government marketing guru and radio host, Mark Amtower. Amtower's *Government Marketing Best Practices* provides real-world advice and war stories on how to improve and, consequently measure, your company's federal marketing success. He reveals a lot of ways NOT to be successful—ones my Dad would file under "snake oil."

After devouring that book, I raced through Amtower's *Why Epiphanies Never Occur to Couch Potatoes*, in which he examines whether one person can "make a positive difference in today's 'shortcut to success' world." The book packs a lot of life lessons into 89 pages. My favorite part—and the one that still makes me chuckle when I recall it—is chapter 6 in which he shares his three personal laws for all business situations:

"1. I don't do things I can't tell my wife and children

2. I don't do things that are not fun (things I am not good at)

3. I don't take [baloney] from things that breathe."

Amtower writes, "I measure myself in two ways: what I think of myself, and what my wife and children think of me. These are simple measurements, and they are as valid as any I have seen. Will you take a moment out of your oh-so-busy schedule and hold a door for someone? Do you say 'please' and 'thank you' enough, and at all the right times, during the day?" Throughout the book, Amtower suggests we constantly look for ways to help others, while not expecting benefits to ourselves.

Maria Shriver's new book *Just Who Will You Be?* is another thought-provoking short read on the subject of personal and professional goals, achievement, and success. The book relates the struggle Shriver went through when asked to speak at her nephew's graduation as she tried to define her thoughts on career, goals, and success. *Publisher's Weekly* wrote "With a combination of self-deprecation and chutzpah, Shriver describes herself as the consummate overachiever, a people-pleasing, legacy-carrying, perfection-seeking Good Girl, now realizing that asking ourselves not just what we want to be but who we want to be is important at every stage in our lives, not just when we're starting out in the world. That's because, in a way, we're starting out fresh in the world every single day."

As do Amtower and Shriver, I take a "holistic" approach to success now that I've (hopefully) matured from that little perfectionist who couldn't (initially) get why she didn't get across-the-board "excellent" on her first performance appraisal.

A plaque stares back at me across my office with a quote that says "A hundred years from now it will not matter what my bank account was, the sort of house I lived in, or the kind of car I drove, but the world may be different because I was important in the life of a child…" I bought it soon after my daughter was born to remind me of how I needed to measure my own success since I'd made the decision to focus my energies on being a good mom, wife—and proposal manager—versus focusing on "making vice president" as many of my friends were doing to the exclusion of all else.

In preparing this article, I wanted to attribute that quote to its originator, so I "Googled" it to see what I could learn. I discovered that Dr. Forest E. Witcraft (1894–1967) wrote it as part of an essay first published in the October 1950 issue of *Scouting* magazine. Dr. Witcraft was a scholar, teacher, and Boy Scout administrator, and his essay has some powerfully thought-provoking messages that still resonate nearly 60 years later.

Within My Power

by Forest Witcraft

I am not a Very Important Man, as importance is commonly rated. I do not have great wealth, control

" . . . Mark Amtower, in *Government Marketing Best Practices,* provides a real-world, straight-talking advice and war stories on how to improve and, consequently, measure your company's federal marketing success."

a big business, or occupy a position of great honor or authority. Yet I may someday mold destiny. For it is within my power to become the most important man in the world in the life of a boy. And every boy is a potential atom bomb in human history.

A humble citizen like myself might have been the Scoutmaster of a Troop in which an undersized unhappy Austrian lad by the name of Adolph might have found a joyous boyhood, full of the ideals of brotherhood, goodwill, and kindness. And the world would have been different.

A humble citizen like myself might have been the organizer of a Scout Troop in which a Russian boy called Joe might have learned the lessons of democratic cooperation.

These men would never have known that they had averted world tragedy, yet actually they would have been among the most important men who ever lived.

All about me are boys. They are the makers of history, the builders of tomorrow. If I can have some part in guiding them up the trails of Scouting, on to the high road of noble character and constructive citizenship, I may prove to be the most important man in their lives, the most important man in my community.

A hundred years from now it will not matter what my bank account was, the sort of house I lived in, or the kind of car I drove. But the world may be different, because I was important in the life of a boy.

I look at my plaque with Dr. Witcraft's quotation often to reinforce my own "measurements of success," and I always act and work in a way that would make my family proud of me. As you read through this issue of the *Executive Summary*, enjoy seeing the various ways we measure success in the business development and proposal industry. Then, take a few minutes to reflect on how you measure your own personal success. Feel free to email your thoughts to me on the subject—I'll share them with all of our colleagues at Professional Day, where we'll all enjoy a chance to reflect on "measuring success."

Beth Wingate, AM.APMP, is the APMP NCA Chapter President. Feel free to email your thoughts to her on the subject at beth@apmpnca.org.

"The best way to get what you need from SMEs is to ask them the questions you need answered directly and draw a basic representation for their answers as they speak."

Ask the Graphics Guru

Mike Parkinson

24 Hour Company recently asked more than 400 fellow proposal professionals, "What keeps you up at night?" The response was amazing! I will dedicate my articles to offering solutions to the challenges reported most often. If you have a reoccurring problem, do not hesitate to email me at mike@24hrco.com.

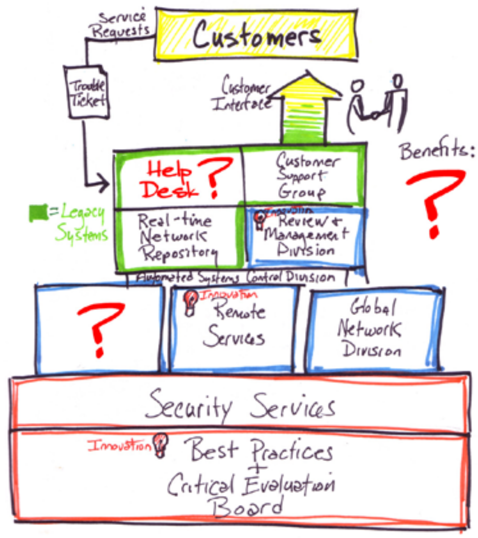
How can I get useful information from subject matter experts in a timely matter?

Great question! Authors and designers must understand the subject matter to effectively do their jobs. Communicating with the SME directly or indirectly is critical for the success of the proposal. An author cannot write a compelling proposal if they do not fully understand the solution. Likewise, a designer cannot offer suggestions for improvement if the graphic's purpose and subject matter is unclear. The subject matter experts (SME) need to educate someone on the proposal team so that knowledge can be shared. But what is the best way to communicate that message?

I have found that SMEs like to share what they know. Even under impending deadlines from their "real job," SMEs will stop to impart their knowledge to an interested audience at the drop of a hat (even if they grumble a bit before doing so). It is my job to track down SMEs and learn what they know so I can conceptualize and render a graphic depicting the winning solution.

The best way to get what you need from SMEs is to ask them the questions you need answered directly and draw a basic representation of their answers as they speak. Alternatively, take notes and after you have more than 50% of what you need, draw a basic representation and ask for input and clarification. (Think of it as an interview for a newspaper, not the Spanish Inquisition. Drawing or taking notes as they speak demonstrates how interesting and important their words are to you.)

Often, SMEs get down into the "weeds" and focus on details that do not matter to your proposal. To keep them out of the "weeds," I repeat the question and draw a crude representation of the



solution indicating where I need more input. I use the graphic to show them what level of detail I need and what information I am missing.

Representing the SME's solution in a graphic quickly shows you what information you are missing. Typically, I think I have everything until I try to render it on paper. At that point, it is obvious where I am lost. I return to the SME for his or her input.

If you cannot interface with the SMEs directly, I highly recommend that you use the process in my book, *Do-It-Yourself Billion Dollar Business Graphics*. The book has an interview form that you can tailor to meet your needs. Ask the SMEs for an interview. (An "interview" sounds like a break from their day-to-day tasks.) Tell them the president of the company—or the highest-ranking person to review your proposal—will read the information that will be shared in their interview. (It communicates the importance of the interview.) When applicable, tell the SMEs the benefit of contributing toward the development of this winning proposal. For example, they keep their job, get a raise, work less, and so on. Send it via email and give them a due date that is fast approaching. (The sooner the better. The impending deadline elevates the activity to urgent.)

"Ask the SMEs for an Interview. (An 'interview' sounds like a break from their day-to-day tasks.)"

"Research your target audience. Is your solution tailored to them?"

Help! No one is buying my solutions. What can I do?

Assuming you have a good solution, the issue is that the value of your solution is lost and fears were not allayed within your proposal and/or marketing materials. You want to sell the value or benefit of your solutions to your future client. What specific problem does your solution solve for your client? In what ways will your solution benefit your future client? How is your solution better than similar solutions? If you can answer these questions and quickly share this information with your future client, you are close to a sale.

Look at it from the buyer's point of view. Why should the buyer care? (In America, we want sellers to get to the point.) Buyers want a pitch that focuses on their specific needs (not generalizations), and it must be compelling. Research your target audience. Is your solution tailored to them? For example, if you are selling new software, how will it save them money or time or streamline their processes? In essence, how does it benefit them specifically?

This is where graphics come into play. Graphics communicate up to 60,000 faster than text. They are remembered (at least) 38% more and are proven to increase the likelihood of a sale by 43%. If the benefits and discriminators are woven into a compelling visual, your likelihood of success increases dramatically. Developing customer-focused graphics for proposals forces you to think about your solution from the clients' point of view and to boil everything down into what matters to them. It also shows you are committed to their business. Because you have the resources to develop clear, communicative, compelling visuals, you separate yourself from your competition. Your future client assumes that if you have the resources and commitment to develop effective graphics, then you probably have the resources to meet their needs. (For hundreds of graphic examples, type *http://www.billiondollargraphics.com/businessgraphiclibrary.html* into your browser.)

This brings us to the next issue: fear. You must allay your future clients' fear of choosing the wrong solutions. Their organization's and personal success is on the line. If they choose poorly, they will be reprimanded or worse. The old saying is that no one gets fired when buying IBM. Why? Because IBM was considered a reliable, stable company. Essentially, IBM was synonymous with low risk. You want to communicate that your solution has little to no risk involved. How you do it depends on your market. For example, would fears dissolve if you demonstrate how your company's solutions have helped others to succeed (assuming the benefits are applicable to your future client's goals)?

Many proposals involve another layer. People buy people and people do not buy from people they do not trust. Trust is established through rapport and reputation. For example, if you take the time to get to know and understand your future clients, you have an advantage. They now know and trust you, and you have insight into their biggest needs and concerns. You can address those issues quickly with a graphic. Your future clients can use that graphic to easily up-sell your solution to their boss.

Figure 2.1: Our disaster response software is being used by FEMA to achieve the same goals you outlined:

- Transition to consultants
- Lower the cost per employee
- Increase the quality of our performance

". . . using graphics to quickly communicate the value of your solution and discriminators, while allaying the fear of failure, is a recipe for success."

Any way you look at it, using graphics to quickly communicate the value of your solution and discriminators, while allaying the fear of failure, is a recipe for success.

Recently, a friend contacted me about the following RFP requirement submitted by a DoD agency:

> *"Graphs shall be presented in no smaller than a 10 pt font and should contain a grid, which allows values to be read directly from the graph to the same accuracy that a 10 x 10 to the 1⁄2 inch grid provides. Graphic resolution should be consistent with the purpose of the data presented."*

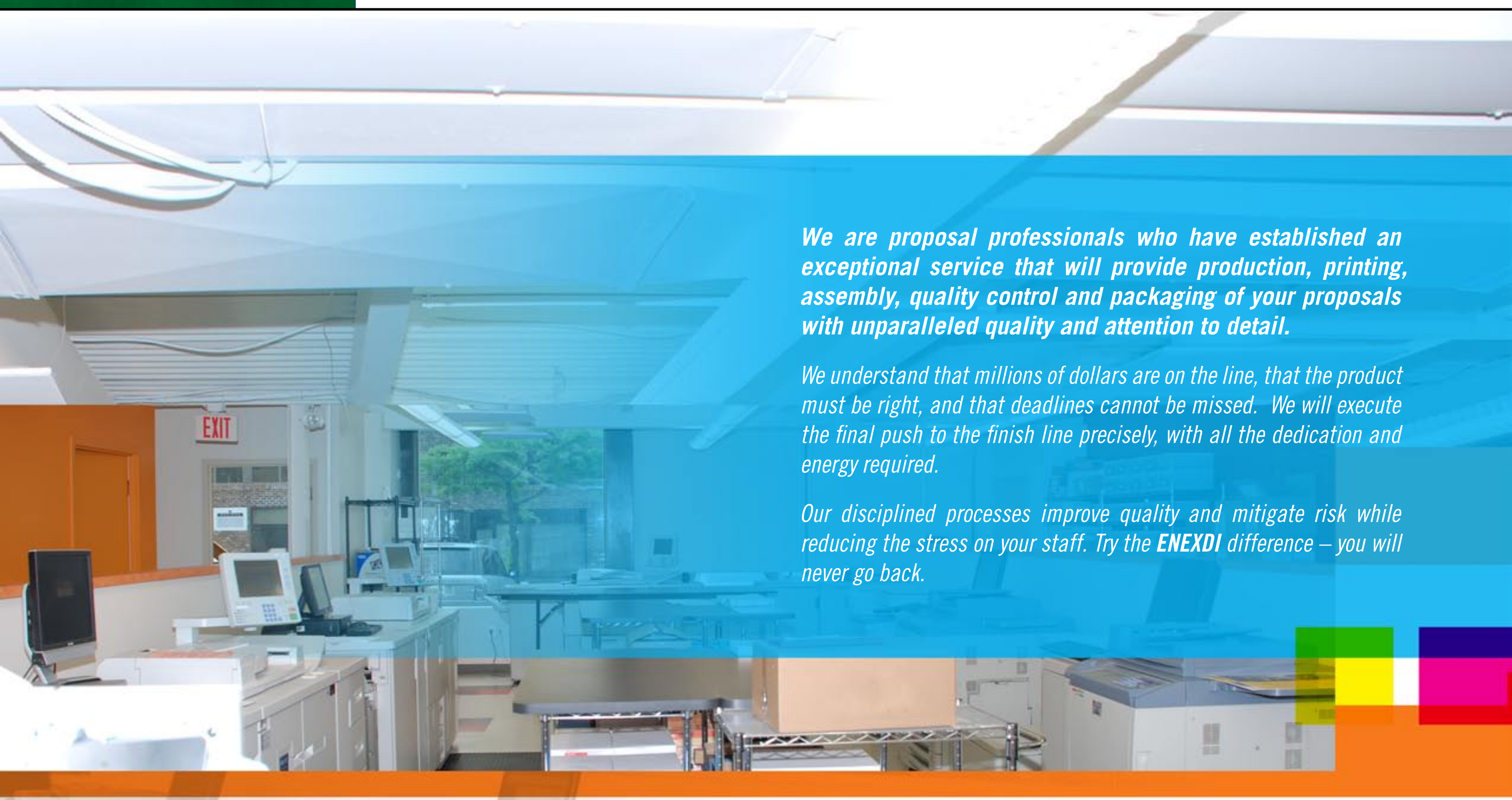
What do they mean? Why would they ask? How do I do it?

The grid is a smart addition on the part of your future client. It is design 101. The use of a grid helps designers (and non-designers) guarantee legibility, consistency, order, and balance and abstain from putting too much detail in too little space. You can make a .5" grid in any software.

My interpretation is that the DoD wants bidders to avoid diagonal text, curved lines and arrows, tight text, inconsistent spacing, and the disordered placement of graphical elements. I doubt that they will overlay a .5" grid and check for alignment. However, deviating from an ordered, methodical approach to layout will expose the fact that the bidder did not care about their request.

Many times, RFPs are "Frankenstein'd" from other RFPs. Weird requests find their way into RFPs. Ask for clarification when possible. In this case, the request seems to be born from necessity. As more weight is placed on graphics, the DoD agency is tired of bad graphics that are difficult to evaluate, so they sought a solution—the grid.

Mike Parkinson is an internationally recognized visual communications expert, multi-published author, professional trainer, public speaker, and recent APMP Fellow. He is a partner at 24 Hour Company specializing in bid-winning proposal graphics. His Billion Dollar Graphics web site (www.BillionDollarGraphics.com) and Billion Dollar Business Graphics book share best practices and helpful tools with proposal professionals. Contact Mike at mike@24hrco.com.



Capture Managers I Have Known and Loved

Wendy Frieman

"This article examines three key capture manager archetypes and offers suggestions on how proposal managers can approach them."

"Obsessive attention to detail is not that distant from a willful ignorance of all detail. Treading the middle path and making judgement calls about which details merit a capture manager's time and attention are difficult tasks."

Oh, that proposal-capture relationship: intense, involved, and intractable. When the final request for proposal (RFP) appears, capture managers and proposal managers are supposed to work hand-in-glove with a perfect and seamless hand-off from one to the other. How often does it happen this way? How many dreams can one proposal manager have about such a hand-off?

The reason that it sometimes (!) doesn't work this way is the wide range in style and experience of capture managers. Although everyone has unique stories, certain archetypes appear and reappear. This article examines three key capture manager archetypes and offers suggestions on how proposal managers can approach them.

"A capture manager who engages only at the very end may not realize that a change on one page will also necessitate changes on several other pages."

One is the "I'll see you at the win party." This capture manager believes that the capture is done when a draft or final RFP appears. She does not answer emails with the important questions about the solution that won't hold water, the teaming partner who won't provide proposal content, or the pricing team that is waiting for a decision on what fee to charge. When you confront her about her absences and lack of responsiveness, she assures you that she is fighting important corporate battles that threaten to destroy the bid if not properly handled. She leaves you on your own to manage the multiple contributors and stakeholders, and their conflicting priorities and interests. Although she might appear the day before a color review and take issue with your decisions, you might only see her the day the proposal is delivered.

The second is a "That comma should be a semi-colon." This capture manager is down in the weeds. He thinks he is delegating and he says she [the proposal manager??] is delegating; but in reality, he wants to sign off on every detail. He regularly overrides you on decisions that fall clearly within the purview of the proposal manager, such as the outline and the schedule. Chances are that he used to be a proposal manager himself, or that he has only worked with inexperienced proposal managers and does not perceive the difference between a manager and a coordinator.

Despite the penchant for control, this type of capture manager may ignore critical issues that are creating roadblocks for the proposal. One such roadblock might be the need to replace team members or writers who are not pulling their weight. Instead, you'll find him measuring the margins on your pink team draft. Although it sounds like the polar opposite of our first archetype, the two ends of the spectrum are quite near each other. Obsessive attention to detail is not that distant from a willful ignorance of all detail. Treading the middle path and making judgment calls about which details merit a capture manager's time and attention are difficult tasks.

"Don't worry—I'll pull it all together at the end." In other words, do we have a capture manager as hero, or a capture manager as martyr (a less attractive variant)? This capture manager secretly thrills at the prospect of staying up all night the last two or three nights before proposal delivery and fixing others' mistakes. He will claim credit for having completely rewritten major proposal sections to bring them into compliance and thereby saving the team from disaster. In reality, this capture manager could well end up introducing errors into the proposal. Large proposals typically have many moving parts that are interdependent.

Special Points of Interest

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Access presentations from previous APMP-NCA Roundtables at www.apmpnca.org/presentations.html

Anyone interested in a Roundtable topic is invited to attend our Rountables. 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 you to join us!

Self-update your email address directly on the NCA Member and Colleague Database page on NCA's Web site at www.apmpnca.org/redesign/members/login.cfm

A capture manager who only engages at the very end may not realize that a change on one page will also necessitate changes on several other pages. A succession of late nights does not usually result in clear, compelling prose. Moreover, this capture manager ignores the value of checks and balances in quality control. Guaranteeing that one pair of eyes will catch every mistake or omission is virtually impossible. The desire for individual glory threatens the effort of the rest of the team.

> ". . . communicate about expectations at the outset."

The third is the Capturephrenia. This individual zigs and zags among the different archetypes. One day she is obsessed with commas, the next day she only wants to talk about strategy and positioning. The cause of this behavior could be a lack of experience or confidence, which makes her susceptible to the last piece of advice she heard from a higher-up or a business development website. The proposal manager has to manage each day's schedule according to the capture manager's mood and disposition. This is not the best use of a proposal manager's time, but it's necessary for survival.

How to navigate among these archetypes? Only one practical solution exists: communicate about expectations at the outset. Even if the proposal manager gets thrown into a drowning proposal and time is short, take an hour, or a day, or as long as it takes to clarify expectations about roles and responsibilities. For example, if the capture manager says, "Don't worry–I'll handle the cost volume," what does that mean exactly? Will he proof all the spreadsheets? Will he check the ORCA online to make sure all of the correct terms and conditions have been agreed to? Will he put the headers and footers on each page? If the capture manager looks at the proposal manager and says, "You are responsible for compliance," what exactly does that mean? Does it mean that the page numbers are in the correct place, or that the solution meets all technical specifications, or both? There is no right or wrong answer to these questions; what is important is that the proposal and capture managers agree on the one answer that will govern this specific proposal.

When the capture-proposal team is working in harmony, it's a beautiful thing! Think Jeeves and Wooster, Don Quixote and Sancho Panza, Fred and Ginger. That kind of teamwork takes time to nurture and grow. It can happen in the world of proposals, and it's worth striving for. It's the goal at the end of the archetypal rainbow.

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Win Rates: Marketing Ploy or a Real Metric?

Olessia Smotrova-Taylor

"Many proposal people are highly opinionated about win rates, but suprisingly few know enough about this metric to have a meaningful discussion devoid of emotion."

At a recent lunch, a fellow proposal consultant self-admittedly got on a favorite soap box. His pet subject was criticizing the whole notion of win rates as a metric for proposal professionals' success.

He said win rates are all fake or suspect, and they do not reflect a real picture. People who claim their win rates are really high are distorting the truth. People whose win rates may be low but who write great technical proposals that lose on price should count those as a win, and not a loss, to be fair to their ability as a proposal manager.

I said, wait a minute. A loss is a loss is a loss. I think there is another issue here at play—a fundamental lack of understanding of how win rates are calculated. Many proposal people are highly opinionated about win rates, but surprisingly few know enough about this metric to have a meaningful discussion devoid of emotion. Many executives and business developers also should be careful when they see a proposal professional claim a high rate or present a seemingly low rate. Instead of getting really excited or discouraged, they need to first understand what's behind the number.

One mistake that people commonly make with a win rate is to derive it simply by counting the number of proposals won versus the number of proposals lost. This is the metric that causes the most upet for proposal professionals, as those numbers never look that good. This is by far the most unfair, and frankly, the most meaningless way of calculating a win rate. A loss of a proposal that's $10 million does not cancel out a win that's $1 billion.

The way a win rate should be calculated is by looking at the amount of dollars won versus the amount of dollars lost. This is how the proposal folks and consultancies that claim high win rates get to such high numbers. These are also the results that proposal professionals who do not understand the way the rate should be calculated file in the "another marketing lie" category.

Needless to say, the only way a proposal professional or a firm can make a claim of a win rate is by keeping an accurate tally of all the pursuits worked, and record whether this was a win or a loss, the amount of the booking including option years, and the resulting win rate percent.

Now, there are three cautionary points that I would like to make. The first one is that there is still room to "play" with the rate, and when someone advertises their impressive rate, you need to ask them how they derived it.

The biggest mistake that people make with the rate in government proposals is by counting the multiple award indefinite delivery/indefinite quantity (ID/IQ) or government-wide acquisition contracts (GWAC). Those are just a "license to hunt," so the sizeable dollar ceilings cannot be added into the total amount won. Since these can be very challenging wins as well, they should be counted—only separately. For example, my win rate is 94% for the "regular" contracts, but it is 99% for contracts when counting ID/IQs and GWACs.

The second cautionary point is that people have to be consistent with which proposals they count.

You should always ask how they derived their win rate. For example, do they count only the proposals where they felt they had control over the outcome? Do they count all the pursuits in which they have ever taken part, no matter what role they played? Do they only count the pursuits they managed, but omit the ones where they were a contributor? Or do they apply a specific set of criteria, such as the threshold of involvement? This could be based on the minimum percentage they are involved in the pursuit in order to count, based on the number of hours versus the length of the pursuit.

Whatever the method, you need to know what it is to understand what the win rate number really means, and whether it was derived consistently. If the proposal professional cannot answer the question quickly and succinctly on how they derived the rate, then you cannot trust that they did not cherry pick whichever win they liked to count, and whichever loss they liked to discount, in order to make the numbers look more impressive.

The third, and the most important cautionary point, is not to be distracted by the glitter and the smoke and mirrors of what a win rate represents. Of course, this may be the best known and the most visually impressive way of judging someone's abilities, other than adding up all the millions and billions they won. Win rate, however, when calculated properly, is just one of the dozens of metrics and criteria that should be applied to measure someone's professional competence and predict the level of success they could bring to your business development effort.

Olessia Smotrova-Taylor is president of OST Global Solutions, Inc. She serves as the Executive Summary newsletter editor. You can find more of her articles, free webinars, tutorials, and her Business Development blog at www.ostglobalsolutions.com. Please contact her with comments and feedback at otaylor@ostglobalsolutions.com.

Applying Industry Best Practices to Proposal Management

Brenda Crist

How do you measure your success as a proposal professional?

I had one former boss tell me my success (and bonuses) depended solely on the company's win rate, and proceeded to bid on anything that moved whether the company had any previous experience performing similar work or not. Needless to say, my success rate was not particularly high, and I never got a bonus.

Obviously, this single metric was not working, but it prompted me to think about other metrics and best practices I could apply to improve my performance and quality.

Then it occurred to me. I spend a great deal of time explaining how to apply "industry best practices" and performance-based metrics to the technical and management solutions of proposals I write. Why not glean lessons learned from these solutions and apply them to my own situation?

First, I reviewed popular proposal "how to" books, but they typically focused on narrow topics and did not address the entire proposal life cycle. The one metric these books seemed to agree on, though, was completing the proposal on schedule and developing detailed schedules backwards from proposal milestones and the due date.

Second, I consulted the standards I usually reference when writing a technical or management solution for a proposal. Three standards stood out:

- Project Management Institution (PMI) Project Management Book of Knowledge (PMBoK)

"I spend a great deal of time explaining how to apply "industry best practices" and performance-based merics to the techncial and management solutions of proposals I write. Why not glean lessons learned from these solutions and apply them to my own situation"

- Capability Maturity Model Integrated (CMMI)
- Information Technology Infrastructure Library (ITIL)

From these standards, I derived my ideas for metrics and the associated best practices I recommend for improving proposal operations. The following paragraphs describe my conclusions.

What We Can Learn from PMBoK
What is the PMBoK? It is an internationally recognized standard (IEEE Std. 1490-2003) describing how to manage a project. It covers nine major project management components including time, cost, quality, risk, and communications management.

Best Practices Gleaned from PMBoK
In addition to delivering a proposal on schedule, you must deliver a proposal within your bid and proposal (B&P) budget. The PMBoK offers several best practices for meeting the cost metric.

First, estimate your bid costs using these techniques:

1) Estimate costs based on analogous historical data
2) Estimate costs from the bottom-up
3) Estimate costs using parametric models —like cost per unit.

After identifying your costs, create a reserve or cushion to guard against risks. I typically reserve at least 10%.

After developing your budget, create a cost baseline or "spend plan" to identify how money will be spent over a given period. Next, implement triggers like burn rates to identify variances and their impact on the cost baseline. Report costs weekly, while also addressing issues and cost variances. Finally, after you deliver the proposal, consider your cost control results and prepare lessons learned.

What We Can Learn from CMMI
What is CMMI? CMMI is a process improvement approach that helps to integrate organizational functions, set process improvement goals and priorities, provide guidance for quality processes, and provide a point of reference for appraising current processes. Traditionally, this process is associated with software development projects.

Best Practices Gleaned from CMMI
One metric I use to judge the success of proposal coordination efforts is whether we kept documents under configuration control so they were easily accessible.

Configuration management is a core CMMI process area, and can become a choke point if an important document is misplaced or lost. CMMI teaches us four valuable lessons about configuration management. First, treat incoming information as a configuration item (CI). Categorize and number each CI, and ensure its traceability throughout out the proposal life cycle. I recommend implementing this discipline by storing CIs in easily identified folder names, and implementing a CI naming and numbering convention.

Second, define your change control process so all proposal participants understand it. Do not add, modify, or delete a CI (or document) without following change control procedure. If you are using an automated collaboration tool, teach users how to check documents in and out.

How can anyone juggle this many balls at one time? Use CMMI Configuration Management.

"After identifying your costs, create a reserve or cushion to guard against risks. I typically reserve at least 10%."

"One metric I use to judge the success of proposal coordination efforts is whether we kept the documents under configuration control so they were easily accessible."

Third, be prepared to provide immediate status on a CI and identify its connection to a baseline (blue, pink, red, or gold). Fourth, after you deliver the proposal, ensure your configuration library or database is easily auditable. Audits verify the correct and authorized versions of CIs exist, so if you must retrieve a document for BAFO, you are retrieving the correct version.

What We Can Learn from ITIL

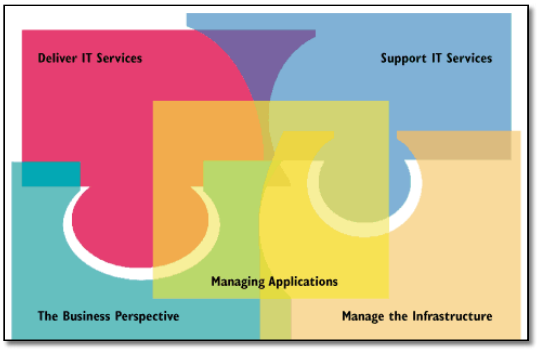
What is ITIL? ITIL is the most widely accepted approach to IT service management worldwide. ITIL provides a cohesive set of best practices including those for incident, problem, release, capacity, and availability management. It has been traditionally associated with service desk or IT infrastructure projects.

Best Practices Gleaned from ITIL

An ITIL-based metric I use to determine proposal management success is whether the information/knowledge we report is timely and accurate.

According to ITIL, the benefits of effective knowledge management include reducing the time needed to find and respond to requests for information and reducing your dependency on heroes to acquire information.

To set up a knowledge management system that provides timely and accurate data when you need it, ITIL recommends:



Components of the ITIL Framework

1. Establishing a knowledge management strategy
2. Identifying the best knowledge transfer methods for your organization or proposal
3. Implementing data and information management procedures.

When creating your knowledge management strategy, ITIL recommends preparing a governance model describing roles and responsibilities, such as defining how you will capture and maintain knowledge.

When defining your knowledge transfer method, consider your audience and the writers who will produce proposal text. Is the most efficient and effective means of knowledge transfer 1) having the subject matter expert write a draft, 2) having a group discussion with someone recording the knowledge, or 3) interviewing subject matter experts?

When implementing a data and information management process, ITIL recommends defining procedures for:

- Securing, updating, and maintaining knowledge
- Authorizing data storage, retrieval, and access to the information
- Defining how information is backed up and restored
- Specifying how long knowledge is retained and how it is destroyed

After establishing schedule, cost, configuration, and knowledge management metrics to measure your success, consider collecting historic data on your performance. Use this data to implement a second ITIL best practice, Continual Service Improvement (CSI). By adapting the CSI framework to proposal management activities, you can increase efficiency and reduce proposal operations costs.

Summary

The next time your boss judges your performance solely on win rate, explain clearly that a professional proposal department operation using industry best practices and metrics is a better way to judge success and a more likely way to turn out winning proposals.

Brenda Crist, principal consultant at Lohfeld Consulting Group, has more than 25 years of experience providing capture, proposal, and program management support for information technology (IT) companies serving the Federal market. She can be reached at bcrist@lohfeldconsulting.com.

Legal Corner: How the Government Measures a Contractor's Success

Shlomo D. Katz, Counsel

"What offerors do have more—yet not complete—control over is what past performance is considered."

Dr. Jonas Salk, the discoverer of the polio vaccine, is reported to have said, "The reward for work well done is the opportunity to do more.[1]" Or, as the Federal Acquisition Regulation (FAR) states, perhaps a bit less poetically, "Past performance information is one indicator of an offeror's ability to perform the contract successfully.[2]" For this reason, agencies are strongly encouraged to consider an offeror's past performance in making decisions about awarding future contracts.

Offerors and their proposal professionals have little control over many aspects of the past performance evaluation. For example, the exact weight that past performance is given in a particular procurement is up to the discretion of the procuring agency, with the key caveats being that the agency must adhere to the announced evaluation scheme and treat all offerors equally.[3] Likewise, offerors typically have little say over how complex—some might say, convoluted—the agency makes the past performance evaluation, all in the name of fulfilling the mandate of the FAR. When considering past performance information, "The currency and relevance of the information, source of the information, context of the data, and general trends in contractor's performance shall be considered.[4]"

What offerors do have more—yet not complete—control over is what past performance is considered. Let's look at the three primary sources through which agencies obtain past performance information and measure a contractor's success.

The first, and perhaps the one best known to proposal professionals, is the solicitation's Past Performance Questionnaire. The FAR specifically requires agencies to "provide offerors an opportunity to identify past or current contracts (including Federal, State, and local government and private businesses) for efforts similar to the Government requirement.[5]"

Also, the FAR states that the solicitation shall authorize offerors to provide information on problems encountered on the identified contracts and the offeror's corrective actions.[6] This is the information source over which offerors have the

APMP-NCA Job Board Offers Quantity Discount

The APMP-NCA Job Board is starting its third year of operation. To commemorate that, the NCA Board of Directors approved a proposal to offer employers a discount.

Here is how the NCA Job Board works. Employers log on to the NCA website and complete the online form that includes the:

- Job title
- Employer name
- Job description
- Employer contact

The job posting runs for 90 days, and the cost to the employer is $65.

Employees can place 10 job postings on the NCA Job Board for $600. That is a saving of $50.

For more information, contact NCA Ombudsman, Rick Patterson, at richard@apmpnca.org or call (703) 263-9240.

greatest control. Naturally, in identifying the customers to be contacted, offerors should make an effort to select customers who will give good references. An interesting dilemma arises when an offeror's most relevant experience is not his best. Whether or not to list this reference must be determined case-by-case. If the reference is listed, the offeror should be certain to take advantage of the FAR requirement that states that offerors have the opportunity to provide information on problems encountered on the identified contracts and the offeror's corrective actions. While this stance may be hotly debated by some, an argument can be made that it is better if the agency hears about problems on a relevant contract from the contractor rather than from the other customer.

"An interesting dilemma arises when an offeror's most relevant experience is not his best."

A second source of past performance information is a series of online databases such as the Past Performance Information Retrieval System (PPIRS), found at http://www.ppirs.gov. These databases exist because the FAR requires Government agencies to collect "Contractor Performance Information," more commonly known as "past performance information." Databases such as PPIRS provide a query capability for authorized users to retrieve report card information detailing a contractor's past performance, and also permit contractors to view, and sometimes comment on, their own data.

". . . contractors should ensure that they review these databases regularly and take advantage of all opportunities to comment on reviews of their past performance."

What kind of information is in PPIRS and its component databases? The FAR defines "past performance information" as:

> *relevant information, for future source selection purposes, regarding a contractor's actions under previously awarded contracts. It includes, for example, the contractor's record of conforming to contract requirements and to standards of good workmanship; the contractor's record of forecasting and controlling costs; the contractor's adherence to contract schedules, including the administrative aspects of performance; the contractor's history of reasonable and cooperative behavior and commitment to customer satisfaction; and generally, the contractor's business-like concern for the interest of the customer.*[7]

To populate the database, the FAR instructs agencies to prepare an evaluation of contractor performance for each contract that exceeds the simplified acquisition threshold at the time the work under the contract is completed. In addition, for contracts with a period of performance, including options, that exceeds one year, agencies are supposed to prepare interim evaluations to provide current information for source selection purposes. This evaluation is generally for the entity, division, or unit that performed the contract. Agencies may establish the content and format of performance evaluations tailored to the size, content, and complexity of the contractual requirements, but they are directed by the FAR to include an assessment of contractor performance against, and efforts to achieve, the goals identified in any applicable small business subcontracting plan.[8]

Offerors will not necessarily know when a Government agency has queried the PPIRS or related databases. Accordingly, contractors should ensure that they review these databases regularly and take advantage of all opportunities to comment on reviews of their past performance. While proposal professionals in larger organizations will not generally be involved in that process, they certainly could have a role in educating their internal or external clients about the importance of past performance information and the opportunities to influence its contents.

The third source of past performance information that agencies may, and sometimes are required to, consider when evaluating proposals is personal knowledge. The Government Accountability Office (GAO) has stated many times (in ruling on bid protests) that an evaluator's personal knowledge of an offeror may be properly considered in a past performance evaluation.[9] In fact, in a small number of cases, GAO has said that certain past performance information that was known to the contracting officer was "too close at hand" to be ignored in the evaluation.[10] This type of information is the most difficult to control. At a minimum, when deciding whether to include a particular less-than-stellar reference with some image-burnishing explanations, or to omit the reference entirely, offerors should consider whether the agency is likely to know about the negative performance information on its own. If so, there is little to be gained by hiding it, but possibly much to be gained by explaining it.

The Office of Federal Procurement Policy has instructed contracting agencies that: "Achieving a state where all potential contractors offer the same risk free, high quality service, and only cost plays in the source selection decision, is the ultimate goal. That is not likely anytime soon. If we did not assess and record contractor performance during the contract and then use that information in source selections, we would lose a significant motivator for contractors to perform all contracts at a high level. Past performance information improves your chances that all the technical and cost information provided is a reliable predictor of future performance.[11]" For contractors, being aware of your past performance information improves your chances that all the technical and cost information you provide will lead to your selection and the opportunity to provide future performance.

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[1] *http://www.wisdomquotes.com/cat_success.html*

[2] *FAR § 15.305(a)(2)(i)*

[3] *Weidlinger Associates, Inc., B- 299433, 2007 CPD ¶ 91*

[4] *FAR § 15.305(a)(2)(i)*

[5] *Id., paragraph (a)(2)(ii)*

[6] *Id*

[7] *FAR § 42.1501*

[8] *FAR § 42.1502*

[9] *See, e.g., Daylight Tree Service & Equipment, LLC, B-310808, 2008 CPD ¶ 23; Omega World Travel, Inc., B-271262, 96-2 CPD ¶ 44*

[10] *See, e.g., International Bus. Servs., Inc., B-275554, 97-1 CPD ¶ 114*

[11] *http://www.whitehouse.gov/omb/procurement/contract_perf/best_practice_re_past_perf.html*

Shlomo D. Katz is Counsel in the Washington, DC office of the international law firm of Brown Rudnick LLP, a Corporate Sponsor of APMP-NCA. If you have any questions about these or other proposal issues, please contact him at (202) 536-1753 or at sdkatz@brownrudnick.com.

Does Your Proposal Theme Measure Up?

Chris Simmons

Part 1: What is a Theme and Why is it Important?

This is the first in a multi-part series of articles on how to create great proposal themes. Part 1 explores the definition of a theme and the benefits of theme development in the proposal process.

"When you think about it, proposal writing is really about telling a story."

When you think about it, proposal writing is really about telling a story. The story is about how your solutions to problems are better than your competitors', told in ways that really matter to your customers. All too often, however, the story is written by authors who are responsible for different chapters with no clear idea of the setting, the characters, the ending, or even the moral of the story. When the proposal manager puts all of the chapters together for the first time (Pink Team) it's no wonder the feedback is all too predictable: "solutions not clearly articulated," "claims are unsubstantiated," and "compelling themes and discriminators are either hidden or missing."

Most proposal teams understand the value of developing themes as the basis for telling their story. But very few teams take the time to develop the central features, benefits, and supporting proof in sufficient detail to achieve the happy (winning) ending they desire.

". . . very few teams take the time to develop the central features, benefits, and supporting proof in sufficient detail to achieve the happy (winning) ending they desire."

A Theme or a Dream?

Many capture managers and sales executives are quick to describe how well they know their prospective customers, how they are uniquely positioned to win new business, and how they

"Well-written themes provide clear and convincing reasons for capturing the attention, and even the imagination, of the evaluators."

have defined the themes the proposal team needs to write a winner. More often then not, these win themes are nothing more than vague, generalized statements that hardly distinguish their well-positioned company from any other bidder. The following win themes were actually posted on the war room wall of one of my customers (code name: DreamThemes), and serve as a vivid example of what win themes are **NOT**.

PROPOSAL WIN THEMES

- Best value
- No risk
- We understand you – better than anyone else
- CMMI Level 3 best practices
- Relevant past performances
- Superior technical solution

The DreamThemes were literally dreamt up by the capture team during lunch earlier in the week and lack the detailed features, benefits, and supporting discriminators required for a complete and compelling proposal. Posting them on the proposal war room wall essentially brainwashed the team into thinking that they had a winning approach and were ready to write.

"The trick is to develop a hierarchy of themes with increasing levels of detail that support each win theme."

In stark contrast, another one of my customers (code name: MeanThemes) spent over two weeks developing a 15-page theme document. The MeanThemes document included five high-level win themes with 4-6 proposal volume-specific sub-themes for each, scores of section and requirement-level themes, with detailed features, benefits, and discriminating proof statements at each thematic level. The MeanTheme document was shared across the entire proposal team to provide high-level writing guidance and served as basis for an Executive Summary that virtually wrote itself.

What is a Theme?

A proposal theme is most commonly defined as a "central idea (feature and benefit) that is supported or proved." Most proposal experts generally agree that themes and supporting discriminators are the MOST EFFECTIVE way to distinguish your proposal from the competition (other than price).

Themes are really the fundamental building blocks for telling your story. Themes are not sales slogans. Most slogans are easy to remember catch-phrases like the current *Washington Post* slogan: "If you don't get it…you don't get it." This slogan is easy to remember, but it lacks any real subscriber features and related benefits such as readability, cost, readership, depth of content, customized subscriber packages, and so on.

What's a 'Win Theme'?

The term 'win theme' is commonly used throughout the proposal industry and only makes the subject of themes more confusing. Win themes are higher level (meta theme) features and benefits that transcend the entire proposal. Effective proposals usually have no more than one or two win themes that are focused on what customers care about the most. Typical examples are low cost, low risk, proven solutions, innovation, or performance-based accountability. The trick is to develop a hierarchy of themes with increasing levels of detail that support each win theme.

What's a Proposal Theme?

Most themes are really proposal themes—feature and benefit statements at the volume, section, sub-section, and even paragraph levels. Proposal themes are much more specific than win themes. They usually appear as a highlighted first sentence and serve as a mini-summary of the subsequent narrative. Well-written proposals have themes in every paragraph and every graphic. Volume themes typically focus on technical, management, past performance, cost, or other volume subjects. Section themes focus on section topics within each volume (think RFP Section L for Federal procurements). Requirement themes focus on requirement level topics within sections and sub-sections (think RFP Section C).

Why are Themes Important?

Proposal themes answer the evaluator's most important question: "Why should we select you?" Volume, section, and requirement themes support the win themes by sending an explicit message to evaluators that is used repeatedly in subtle and not so subtle ways throughout the proposal. Well-written themes provide clear and convincing reasons for capturing the attention, and even the imagination, of the evaluators. When evaluators finish reading their assigned sections, the alignment of solution features with customer benefits and supporting proof points leave no room for doubt, confusion, or skepticism. The bottom line—your proposal is easier to evaluate, tells a compelling story, and has clearly articulated themes that score the most points.

Part 2 of this series takes a closer look at the components of winning proposal themes.

Author Note: Readers may be interested in knowing that despite their early win theme challenges, DreamThemes won their $2 billion multiple-award Blanket Purchase Agreement and the only new entrant bidder selected in a group previously dominated by incumbents. Ironically, MeanThemes lost their $40 million single award to the incumbent with a lower-risk technical solution despite a significantly higher price.

Chris Simmons is the founder and principal member of Rainmakerz Consulting—a business development solutions company specializing in proposal management, writing, and review. Still confused or looking for more detailed suggestions? Take time now to send feedback, comments, or questions about this or other challenging proposal issues to Chris at chris@rainmakerz.biz or (202) 255-2355. Visit www.rainmakerz.biz.

How Does the NCA Chapter Market Its Educational Events?

Beth Wingate, AM.APMP, NCA Chapter President

"This schedule seems to work well for those who are able to plan somewhat far out, for those who wait until the week before the event because of their uncertain schedules, and for those who can actually attend "at the last minute" because a deadline shifted or a proposal was terminated."

Over the years, our NCA Chapter has wrestled with the "correct" balance of emails to promote our educational events, such as our Roundtables, Professional Day, and Proposal Basics Boot Camp.

At one time, we sent as many as three emails each week advertising our events (I complained at that point!). During the past two years, we ratcheted down to one email per week starting about 6 – 8 weeks out from the event, and two emails per week for the two weeks before the event.

The broadcast schedule for our September Roundtable included 11 emails spread out over two months—July 16, 24, and 30; August 5, 14, 21, 26, and 28; and September 2, 4, and 11 (registration closed).

The broadcast schedule for our October 14 Professional Day included up to 16 emails spread out over three months.

We've found that with the multiple proposal deadlines, "pop-up" proposals, and cancelled proposals that we all face, this broadcast schedule provides the best "reminder" mixture for several participant groups. This schedule seems to work well for those who are able to plan somewhat far out, for those who wait until the week before the event because of their uncertain schedules, and for those who can actually attend "at the last minute" because a deadline shifted or a proposal was terminated. In fact, for our July Roundtable, we received 1/3 of the registrations during the last four days of registration based on the last two emails we sent out.

We have to provide and pay a firm attendance guarantee to the hotel where we hold our events on the Thursday before the event, which is another reason for needing our members to sign up for the Roundtables ahead of time (and sending out all of the emails). We can only accommodate a few "walk-ins" at the door without incurring a steep overage charge. In fact, because we basically charge what we pay the hotel for the meals, room, A/V equipment, etc., we have ended up losing money on our events if we have a lot of "walk-ins"—and we definitely don't want to create ill will by turning folks away at the door or by raising the prices of our events.

That being said, we certainly don't want to annoy our members, and we are always happy to suppress someone's email address for a certain event if they let us know in advance that they don't want any more emails. (Perhaps they'll be on vacation/have a solid deadline and can't attend—whatever the reason.) You can automatically suppress your email address for a particular event by clicking on the link at the end of the email you receive.

If you don't wish to receive any future emails from the NCA Chapter, please send a short email to me at any time, and I'll take care of removing your email address from our mailing list. But just be sure your membership is up-to-date so you can periodically access our NCA Body of Knowledge and read the latest *Executive Summary* newsletters!

On a related topic, we're looking for suggestions for automated event registration systems (with low overhead fees) that can help us accept paid registrations for our events, generate attendance/payments lists, and produce name tags with much less "manual" work for our volunteers. If you've had positive experience with such a system, please drop an email to me at beth@apmpnca.org and share your suggestion.

Beth Wingate, AM.APMP, APMP-NCA Chapter President, served as Newsletter Chair and editor/publisher of NCA's Executive Summary newsletter in 2006 and 2007. She has more than 20 years' proposal development experience. Beth is Senior Proposal Manager/Marketing Communications Manager for Lohfeld Consulting Group, Inc. Contact Beth at beth@apmpnca.org.

Writer's Roundup: Grammar and Style

Useful Elements for Measuring Writing Success

Patricia Kent

Recent studies show that the average business executive must read over one million words each week just to keep current. Put another way, the average executive has more than 30 hours of reading per week, but with only 90 minutes to get it done. Translate those statistics into what Government evaluators face when reading our proposals. Is it any wonder that we have a recipe for disaster when our submissions do not meet the simple rules of good reading comprehension? And what is even more startling is that the average reading level across the industry is 8th/9th grade. How can we, as proposal development professionals, increase the effectiveness of the "written word" in our deliverables? Put simply, you can increase your success measurement factor by applying sound writing principles that improve reading comprehension. The next time you write, try applying the following tips:

Fog Index: Clearing the Way for Comprehension

Because of the complex nature of our proposals, can you be sure your audience will easily comprehend the contents of the documents? If that question raises concern, your documents may not be passing the Fog Index. As a countermeasure, ponder three probing questions before you write:

1. How well informed and sophisticated is the reader?
2. How extensive is the reader's vocabulary?

". . . the average executive has more than 30 hours of reading per week, but with only 90 minutes to get it done. Translate those statistics into what Government evaluators face when reading our proposals."

3. Can the reader easily comprehend long and complex sentences?

Then, after you write your document (keeping these questions in mind, of course), apply this test to just one page:

1. Count the number of words, excluding proper nouns
2. Count the number of sentences. Divide that number by the total number of words to determine the average sentence length
3. Calculate the percentage of long words (three syllables or more) by dividing the number of long words by the total number of words and multiplying by 100

   *Example: Percentage of long words = (9/102) * 100 = 11.30%*
4. Add the average sentence length and percentage of long words, and multiply the sum by 0.4 to arrive at the Fog Index number.

A score of 12 or below equals good reading comprehension. A score above 12 means you have a high percentage of long sentences or long words, or both. Use that index to edit the entire document and clear away the fog. TIP: Sentences should not be more than 20–25 words long.

Word Choice: Saying What You Really Mean

In the caverns of our gray matter, a wealth of words reside untouched. We learned these fabulous, picture-painting words from school and work experience. Unfortunately, we keep them stored away instead of retrieving them when we apply fingers to the keyboard or a pencil to paper. We are a generation of habit writers, which implies that we rely on familiar words that automatically pop up. Two words come immediately to mind: provide and develop. Each has several possible derivatives:

- **Provide—**allow (for), furnish, supply, subsidize, make available, replenish, equip
- **Develop—**originate, plan, design, create, devise, conceive, invent, expand on

Of course, these words represent only two examples—only a starting point for changing an old habit. When writing, select words of precise action. Help your reader visualize your message more clearly. For example, we don't just leverage a capability; we exert influence, power, and decision-making. We invest time, money, and energy; and we control outcomes. So the next time you start to write provide or develop, stop and ask: "Is that the most accurate word for the intended action?" If it is, fine. But if another word would be more direct, use it. The reader will appreciate your efforts.

False Subjects: Avoiding Vagueness

False subjects—such as there, here, this, that, and it—create muddled wording and vagueness. These abstract words provide no concrete reference, weaken the sentence structure, and generally occur at the beginning of a sentence, thereby delaying recognition of the true subject.

"False subjects—such as there, here, this, that, and it—create muddled wording and vagueness."

Examples:

1. There are six committee members attending the meeting.

   Change to read as:

   Six committee members are attending the meeting.
2. In designing the new pump, it is possible to meet the demands of the chemical industry standards.

   Change to read as:

   The new pump's design will meet the chemical industry standards.

Note how the changed sentences are not only more precise in meaning, but also shorter. Whenever possible, eliminate the false subject, find the true subject, and link it to the right action word.

Transitions: Making Those Important Connections

As a frequent component of bid requests, the term "transition" requires an explanation of processes and procedures for contract changes. This same concept occurs in writing to show the relationship between topics and ideas. The key is to choose the right transition word or phrase for the intended

"The key is to choose the right transition word or phrase for the intended message."

message. Your choice creates the bridge, hand-off, or point of reference that helps the reader infer the relationship you are implying. Use transitions, for example, to establish additions, comparisons and contrasts, consequences, diversions, illustrations, places, summaries, and time and sequence. When applied effectively, transitions allow the reader to see how the writing is organized and where it is heading.

Active/Passive: Leading with Strength

You have heard it before, and you will hear it again. Writing a sentence in active voice is always preferred. The benefits: Active sentences are usually shorter and more dynamic, and imply self-confidence. Passive voice sentences, on the other hand, project indecisiveness and evasiveness. These constructions prevent—or at least delay—the reader in discovering the performer of the action. Granted, the use of the passive voice has its place. For example, you may have a good reason for not revealing the performer, or maybe the action is more important than the performer. As the writer, you must decide. But just remember—writing in the active voice produces a positive tone, projects decisiveness, and is more likely to convince your reader to act in your favor.

These five tips compose only—if you'll excuse the pun—the "tip of the effective writing iceberg." My thought is to include other suggestions in future articles. In the meantime, good fog hunting!

As a final note, for the this article —

- Number of words per sentence—14.7
- Passive voice—0%
- Flesch-Kincaid Grade Level—9.1

Patricia (Pat) Kent, a Proposal Manager for TechTeam Government Solutions, has nearly 30 years of experience in written communication, which includes having taught high school English and conducting continuing adult education classes in basic grammar and business writing.

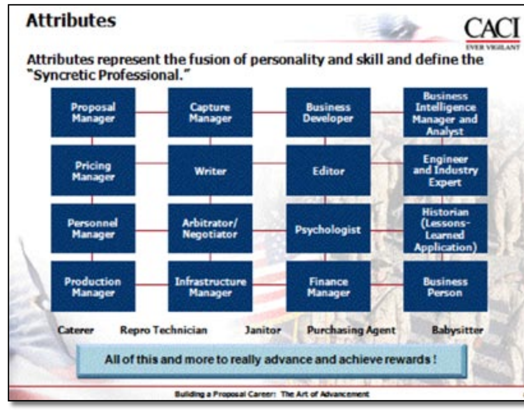
APMP National Capital Area (NCA) Chapter July Roundtable

How to Have a Dream Job in the Proposal Industry

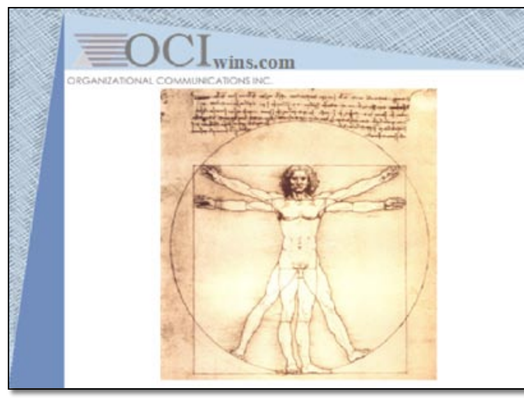
Diane Smith

"Skill development is necessary but not sufficient."

It starts right where you think it does: personality matters and technical skills count. The July 19th Roundtable topic was How to Have a Dream Career in the Proposal Industry. The speakers were Eric Gregory and Russell Smith—two men, two different styles, two very different career paths. And just for the record, both are past presidents of APMP NCA Chapter.



Eric Gregory's presentation was *Speaking for the Art of Advancement Within the Corporation*. Eric is a senior vice president at CACI Federal, Inc., who began with a double major in political science and an English degree from Saint Andrews Presbyterian College, a small liberal arts college in North Carolina. His MA in English was from Virginia Polytechnic Institute, and his MBA is from Johns Hopkins University in Administrative Science. He's worked for RMS Information Systems, High, Litton, Martin Marietta, Allied Signal Technologies, and inside Allied for Bendix. And of course, CACI. Graphically, he might describe his career development as a matrix.



The frame is the corporation. To enhance career opportunities within the corporate structure you need these personality and skill components. All are attributes you can learn, change, and develop. Skill development is necessary but not sufficient. Personality isn't just what you're born with. It can change and evolve if you will it. If you need to write—learn how. Adopt, adapt, and fuse.

"As a consultant, personality skills you need are self-confidence, dependability, flexibility, and the ability to work independently and in a group."

Then there is life as a consultant. Russell Smith is president of Organizational Communications Inc. (OCI). Life outside the corporation, he thinks, is the way of the 21st century economy: everyone will be an independent contractor, and the employer/employee relationships as we know it will disappear.

He started at a big school in a big state—the University of Texas. He received his BA in English and history, his MA in history, and an Ed.D from the College of William and Mary. His MBA work in computer science was done at Old Dominion University.

He was a Lieutenant in the Army, a college professor, and an executive director of Charles

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APMP-NCA Board of Directors Meetings are Open to Managers

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

City-New Kent Community Action Agency—an organization that provides job training to low-income people. He wrote federal grant proposals for educational, arts, social service, and trade organizations. He was a vice president for corporate communications at Computer Dynamics.

As a consultant, personality skills you need are self-confidence, dependability, flexibility, and the ability to work independently and in a group. Smaller places can give you an opportunity to branch out with fewer people doing a wider variety of functions. The management skills are interpretation, judgment, and hands-on management. And because you're not in this alone, and your own business doesn't materialize fully grown with a regular paycheck and benefits, you need to think about your family and how they feel about this independent way of life.

The audience had questions: how do you reconcile not being in it for the money and still having a successful career? Would you personally prefer to hire someone from inside a big business, a small business, or a consultant? What's the most important degree you can get? What's the difference between a manager and a leader?

Corporation. Consultant. They frame things differently, but they agree on the basics. It begins with knowing yourself really, really well. You need to know how much risk you're willing to take, and then take it. Ongoing education matters; you need to keep expanding your skill set. And all things considered, it's better to have an MBA.

Much better than reading this is to see what they have to say themselves. Presentation slides for both are available at http://www.apmpnca.org/presentations.html.

Diane Smith is Director of Proposal Development at Fairfield Technologies Inc in Chantilly, Virginia.

Mark Your Calendar for 2008 & 2009 APMP-NCA Events

- September 17, 2008—Roundtable—Coaching Non-Professional Writers to Get to Blue
- October 14, 2008—Professional Day "Measuring Success"—Refresh Your Knowledge of Winning Practices and Make Connections That Count at Professional Day
- November 19, 2008—Roundtable
- January 21, 2009—Roundtable

Refresh your knowledge of winning practices and make connections that count at Professional Day on October 14!

- Take back the latest proposal development trends and techniques from respected professionals—and give your next proposal a winning edge over your competitors.
- Renew your relationships with current colleagues—and meet new people to expand and enrich your professional network.
- Give yourself a day away from the office to reflect on your own professional development and career.

APMP-NCA 2008 Professional Day

"Measuring Success"

October 14, 2008
8:00 AM – 4:30 PM

Northrop Grumman IT
12900 Federal Systems Park Drive, Fairfax, VA

Here are the member-driven topics and expert presenters we've got lined up for you:

- Measuring Success: Benchmarks in Proposal Management Capabilities—Vicki Griesinger, Business Development International
- Review Teams: The Good, The Bad, and The Ugly—Bob Weissman, Clarus & Fidelis Consulting Corporation
- Price and Technical Working Together to Develop Winning Cost Proposals—Molly Gimmel, Design To Delivery, Inc.
- Can Proposal Professionals Be Happy?—Jayme Sokolow, The Development Source, Inc.
- Improving Your Market Analysis Skills—Richard Colven, INPUT
- Optimizing Relations Between Business Development, Capture, and Proposals—Panelists: Sal Fazzolari, iNEXA Group; Robert Lohfeld, Lohfeld Consulting Group; Wendy Frieman, CSC

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Contact: **dcjobs@thebossgroup.com**
8120 Woodmont Avenue, Suite 400
Bethesda, MD 20814
m.miller@thebossgroup.com
Date Posted: **05/28/2008**

Job Title: **Proposal Professionals**
Company: Whiteford & Associates
Contact: **Dorothy Whiteford**
2001 N. Adams Street
Arlington, VA 22201
dwhitematterconsulting.com
Date Posted: **06/02/2008**

Job Title: **Proposal Manager**
Company: **Circle Solutions Inc.**
Contact: **703.821.8955**
8280 Greensboro Drive
McLean, VA 22102
careers@circlesolutions.com
Date Posted: **07/08/2008**

Job Title: **Proposal Development Center Support**
Company: **Citizant**
Contact: **Sheila Murphy**
5180 Parkstone Drive, Suite 100
Chantilly, VA 20151
smurphy@citizant.com
Date Posted: **07/31/2008**

Job Title: **Freelance Proposal Writer**
Company: **Avisar Information Technology**
Contact: **hr@avisarinc.com**
2111 Wilson Boulevard, Suite 700
Arlington, VA 22201
hr@avisarinc.com
Date Posted: **07/31/2008**

Job Title: **Proposal Manager**
Company: **TechTeam Government Solutions**
Department: **Proposals**
Contact: **Deb Shalom**
6430 Rockledge Drive Suite 150
Bethesda, MD 20854
debra.shalom@techteam.com
Date Posted: **08/05/2008**

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