



Spring 2008

Volume XIV, Issue 2

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Executive Summary

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

President's Corner

Back to Basics

Beth Wingate

As I sit here contemplating the “Back to Basics” theme of our spring 2008 NCA Executive Summary, I have my office window open to enjoy a brief 70-degree day respite from winter—a day preceded last week by an ice storm the day before my proposal was due and soon to be followed by a thunderstorm, flood watch, and then more 30-degree days.

A huge flock of robins is chirping in my side yard (shades of Alfred Hitchcock), little purple crocuses are peeping out from under their covering of fall leaves, Easter candy is hiding in my credenza (there are some compensations to being Mom after all!), and visions of spring cleaning are dancing in my head.

Spring cleaning to me means a few things.

- House projects—including the dreaded window washing, tile-floor sealing, gardening, wardrobe switching, and maybe even those painting projects I've put off forever.
- Work projects—sorting the two piles of papers I've allowed to accumulate in my office because I'm not sure what to do with them and clearing out those three-ring notebooks I haven't opened in 10 to 20 years. (Doesn't Martha Stewart say that if you haven't used “it” in the last year, you should get rid of it? I'll need a dumpster!)
- Personal projects—assessing my current career path, thinking about the projects and proposals I worked on the past year and where some enhanced capabilities and knowledge (MS Excel and MS Project) would have been helpful, and contemplating skills and



abilities I'd like to augment over the coming year (capture management, public speaking). In other words, I am reassessing my own career goals, developing an action plan, and working to the plan.

- Staff projects—helping other team members improve their skills and abilities so they can do their jobs better and faster.

When I managed a proposal center, I constantly focused on how I could improve my staff's capabilities—both to increase the value of the services we provided to our organization and to

“ . . . reassessing my own career goals, developing an action plan and working to the plan.”

improve my staff's careers and marketability. I truly believe the old adage that you should mentor others so they can take over your position.

Now that I'm supporting multiple companies as a consultant, I find numerous opportunities to help my clients improve their proposal processes and products and to help mentor many I work with to improve their own business development and proposal development-related skills.

What work projects, personal projects, and staff projects do you want to accomplish this year? Odds are the NCA Chapter can help you accomplish quite a few of them.

This year we are introducing our Proposal Basics

Take some personal training time to explore the presentations and read the archived *Executive Summary* newsletters. Many articles are as relevant today as they were the day we published them.

Boot Camp on June 6, 2008 (www.apmpnca.org/events.html). Our one-day training event will address the fundamentals of the proposal process and the tools and techniques professionals use in this field. We'll provide beginner to intermediate-level proposal management, proposal coordination, and proposal writing training. Who on your team could use this training? Which of your friends and colleagues at other companies need this training? Take five minutes now to send this newsletter to those folks and suggest they consider attending this event.

Our Professional Day networking and education event on October 14, 2008, will focus on the latest proposal and capture trends and techniques presented by respected business development professionals (www.apmpnca.org/events.html). We encourage participants to stop and take time to look back at their accomplishments and focus on their own career goals during the Professional Day experience.

Our Chapter Roundtable dinner meetings feature timely topics presented by experts in

the field (www.apmpnca.org/events.html). Recent topics included Proposal Pictionary: How To Turn Your Words and Ideas Into Winning Proposal Graphics, Using Source Selection Style Scoring for Color Team Reviews, FEDSIM Proposal Evaluation Methods, Art and Science of Capture Management, and The Blended Bid: Synergizing the Written Proposal and Oral Presentation.

We also publish the *Executive Summary*, our quarterly electronic newsletter. It keeps our members up-to-date on chapter news and the latest proposal intelligence in articles developed by our members. Back issues of the

Executive Summary and summaries of our education presentations reside in the Body of Knowledge section of our Web site (www.apmpnca.org/knowledge_resources.html). Take some personal training time to explore the presentations and

read the archived *Executive Summary* newsletters. Many articles are as relevant today as they were the day we published them.

"We encourage participants to stop and . . . look back at their accomplishments."

continued on page 18



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Ask the Graphics Guru

Mike Parkinson



Graphics cost a lot of time and money and drive me crazy. Are graphics really worth it?

Yes, and I'll tell you why, but first a little background. While researching my book, my goal, believe it or not, was to prove that graphics didn't matter. (The book needed to be honest, backed by empirical evidence, and tell it like it is—not how I wished it to be.) I know from experience that buying decisions are made without the support of graphics, so I suspected these decisions are based on relationships and insight of the potential client. So, I needed to find the truth. I interviewed evaluators, buyers, and experienced proposal professionals. I asked tough questions to prove that graphics did not matter. Surprisingly, again and again, I was told that they do matter. I heard real-world stories that proved graphics directly impact wins. For example, the contracting officer for a ballistics bid told the winning company that its proposal cover was the reason they won. The cover showed the bullet the client needed in a live ammunition test. The cover graphic proved the bullet was ready-to-go, and this proof won the proposal. (The contracting officer also said the proposal itself was written so poorly that it almost cost the company the win.) After several years of research, I heard many similar stories confirming that graphics affected the final outcome. Then I wanted to understand why.

So why do graphics matter? Because we are not robots. Buyers, evaluators, you, me, and everyone else cannot consciously calculate every variable and determine the optimal solution to every decision. We simply do not have the time. However, human beings have developed an amazing way to subconsciously make the best decisions—heuristic thinking. Essentially, we pick up data consciously and subconsciously. Our brains then weigh the gathered information and give us a “gut reaction.” Studies show that this gut reaction is often correct.

Let's say you work for a service-based company. You are in charge of a new task to turn the proprietary software your company developed into revenue-generating assets. Your company will pay \$2M to the company that can do this without compromising the integrity of your core, service-based business. You hear about two companies that can do it—Company A and Company B. Both companies have experience and claim to be industry leaders. Each company visits and presents its proposal. Below is a sample slide from each company (see Figure A).

Our brain subconsciously helps us make our decision. It looks for incongruent information. Which company looks like the industry leader? Our brain makes intuitive judgments based on our experience. Which company has better resources? Which company is more experienced? In other words, which company is better?

Here is why the graphics in this scenario are critical. Company A's graphic is easier to understand and much more memorable. It is aesthetically appealing and, therefore, more likely to be studied and reviewed longer. Additionally, the graphics in the two proposals provide clues that give you insights into Company A and Company B:

Use a few simple rules to help keep your graphics looking professional—stay consistent, keep it clean and simple, do your homework, label elements, and use a “smart” color palette.

Before developing and presenting specialty graphic types, icons, symbols, or imagery, be sure your audience understands what it is you are communicating.



Figure A: Who has the better solution, Company A or Company B?



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APMP-NCA Board of Directors Meetings Are Open to Members

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.



Figure B: Features, Benefits, and Discriminators

- Company A has more resources to help your company. (They had the resources to make a superior proposal.)
- Company A is more invested in working with you. (They spent the money and time to make visuals that speak to your unique challenges.)
- Company A cares more. (They focused on your unique challenges to develop graphics that resonate with you and your company. Company B simply placed canned clip art into their proposal.)

Our brains do an excellent job subconsciously analyzing thousands of bits of information and choosing the best possible solution (see Figure B). Humans are hardwired to be influenced by what we see. What we see plays a major role in our decision. Thanks to life experience, we are wise enough to know we need more than just facts and figures to make the best decision. Have you ever had a bad feeling about someone for no obvious reason? That's often heuristic thinking at work. Our brain picks up subtle cues that say, "WARNING!" The same is true for proposals. Even if your company has a good relationship with your potential client, you want to ensure everything you put in front of them is synonymous with the perception that your company is better than any other. If you ignore this, you may lose the proposal.

Potential clients, evaluators, and decision makers are influenced by what they see. Herbert A. Simon, Nobel Prize-winning scholar at the Carnegie Mellon Institute in Pittsburgh, studied corporate decision-making and found people often ignored formal decision-making models because of time constraints, incomplete information, the inability to calculate consequences, and other variables. Intuitive judgment was the process for many decisions. You want to positively affect your audience's "intuition." If you say your company and solution are the best, then

your proposals need to support that assertion in every way possible. Graphics communicate volumes about you, your company, and your product or service in seconds.

In today's fast-paced world, the speed and efficiency with which you communicate is an important factor in gaining positive favor. Visuals communicate 60,000 times faster than text because text is digested linearly, whereas graphics are absorbed all at once and instantly stored in long-term memory—never to be forgotten. Graphics make it easier for your audience to understand and remember your features, benefits, and discriminators that may otherwise get lost in a sea of words.

Your audience will appreciate your graphics because, like you, they are distracted by 20 other things and would prefer to be home relaxing and not dealing with your proposal. Graphics make it easier for potential clients, evaluators, and decision makers to find what they need to quickly make a decision.

After all, a happy audience makes more favorable decisions. So, are graphics really worth it? Yes! As long as the net value of your win exceeds the cost, using graphics is well worth it because they impact the final decision to such a degree that not using them gives your competition an advantage. You expend a lot of effort and time to write and assemble your proposals. You aren't working that hard to lose. You want to win, and you want every advantage to guarantee that win. According to a 3M-sponsored study at the University of Minnesota School of Management, presenters who use visual aids are 43% more effective in persuading audience members to take a desired course of action than presenters who don't use visuals. Good graphics give you and your company a powerful advantage. So use visuals if you want to increase the likelihood that you will succeed. It's definitely worth it.

Special Points of Interest

As an NCA member, you have more opportunities for networking and education than anywhere else in the country! Check our events calendar at www.apmpnca.org/events.html

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

Anyone interested in a Roundtable topic is invited to attend our Roundtables. 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!

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

Proposal Basics Boot Camp

Brush up on the basics—and the latest proven best practices—at the new Proposal Basics Training Day on June 6.

- If you're new to the proposal industry, build a solid foundation of basic best practices to launch your exciting new career.
- If you've been around a while, find out how the basics have evolved into today's most successful proposal techniques.
- Choose one of three knowledge tracks—for Proposal Coordinators, Writers, or Managers—with five sessions in each track, presented by successful industry practitioners.

...Plus get 5 Continuing Education Units toward your APMP professional accreditation!

REGISTER NOW!

There Are Only a Few Seats Left!



No Walk-ins!
CAMERAS,
Laptops, and
telephones
with cameras will
not be permitted
at Northrop Grumman

Proposal Basics Training Day
June 6, 2008, 8:00 AM to 3:30 PM
Northrop Grumman Colshire Facility
7575 Colshire Drive, McLean, VA

Register now at www.apmpnca.org!

	Proposal Coordinators	Proposal Writers	Proposal Managers
Session 1	<p>Do You Have What It Takes? The Coordinator's Role and Career Path in Today's Profession <i>Wendy Frieman, Main Thrust Proposal Manager, CSC</i></p>	<p>Measure Twice and Cut Once Planning For Writing Customer-Focused Proposal <i>Shipley & Associates</i></p>	<p>It's All in the Team Maximizing the Capture & Proposal Management Relationship <i>Carl Dickson, President www.captureplanning.com</i></p>
Session 2	<p>The Coordinator's Handbook Best Practices, Tools, Processes, and Procedures for Success <i>Ellen Perrine, Vice President AOC Key Solutions, Inc.</i></p>	<p>Keeping It Fresh Within the FAR Writing for the Federal Government <i>Gary Everett, Trainer Organization Communications Inc.</i></p>	<p>You Don't Need To Be An Attorney Read the RFP, Terms and Conditions, and the FAR like an Attorney <i>Shlomo Katz, Counsel Brown Rudnick</i></p>
Session 3	<p>Presentation Matters The Art of Proposal Graphics <i>Mike Parkinson, Principal 24 Hour Company</i></p>	<p>The Zen of Editing Bringing the Proposal to a Better Place <i>Richard T. Mayer, DPA Snowden, Mayer, and Associates, LLC</i></p>	<p>The Proposal Manager's Handbook Best Practices, Tools, Processes, and Procedures for Success <i>J.P. Richard, Vice President Advantage Consulting, Inc.</i></p>
Session 4	<p>Timing is Everything The Science of Proposal Production <i>Douglass Nocerino, Partner ENEXDI</i></p>	<p>Telling Your Story Integrating Your Themes, Focus Boxes, and Action Captions to Create a Compelling Proposal <i>Chris Simmons, Principal Rainmakerz Consulting LLC</i></p>	<p>After The Big Win Creating a Winning Task Order Proposal Process <i>Beth Wingate, AM.APMP; APMP-NCA President; Senior Proposal Manager/Marketing Comm. Director Lohfeld Consulting Group, Inc.</i></p>
Session 5	<p>It's Witchcraft! Secrets of Successful Coordinators <i>Rafif Jouejati, CEO P3 Solutions, LLC</i></p>	<p>Proposal Writing Made Simple You've Made the Team. Now We'll Help You Make the Grade <i>James Dunn, Executive Consultant Red Team Consulting</i></p>	<p>Tool Time Proposal Tools Made Simple <i>John Bender, Vice President Advantage Consulting, Inc.</i></p>

Business Development "To Do" List

Chris Simmons

The greater Washington, DC chapter of the APMP is the largest and arguably one of the most successful of the 23 chapters worldwide. Membership offers numerous opportunities for career growth and advancement, networking, and the latest best-practice processes, tools, and technologies.

- ✓ **Join APMP and the Local Chapter**
- ✓ **Become an Active Member**
- ✓ **DO IT NOW!**

Our local National Capital Area (NCA) chapter has swelled to well over 700 people. Our chapter includes an experienced and diversified group of executives, business development/capture managers, proposal writers, coordinators, graphic artists, editors, and other proposal professionals, representing approximately 50% of the total worldwide APMP membership. The time to join is now. Take a look at the NCA Membership Profile statistics to see how many people you can network with and what kind and how many companies consider it beneficial for their multiple employees to join.

This is only the beginning for the local APMP-NCA chapter, with a plan to grow another 20% in 2008, and offer even more exciting opportunities for its members. The newly elected Board of Directors is fresh with enthusiasm, and new ideas, and has initiated a number of new programs, including the upcoming Proposal Basics Boot Camp on June 6, to provide added value to our membership. However, without continued increases in APMP membership, choice to affiliate with NCA, and active participation, the full potential of our group remains untapped. The time for you and your team to join is now. As Membership Committee chair, I have learned that most non-members have put off

joining the APMP for weeks, months, and in some cases even years! The primary reason—it simply doesn't make it to the top of the business development "to do" list since time is always of the essence in this profession. It takes, however, only 5 minutes to join APMP and the NCA chapter. Do it now, while it's on your mind . . . and on your screen.

How do I become an APMP member?

It's a fast, simple, 4-step process. 1) Log onto www.apmpnca.org 2) Click on "Affiliate with the NCA Chapter...FREE!" 3) Scroll down and click on "If you're not an APMP member, join now!" 4) Complete the New Member Registration Form.

How do I join the local chapter?

New APMP members can affiliate with NCA as part of the APMP registration process. Simply click on "Do you wish to be affiliated with a local Chapter?" and select "National Capital Area Chapter." If you are already a member, but have not yet affiliated with the NCA, follow these 3 steps: 1) Login to the APMP website; 2) Click on "View Account Detail;" 3) Click on "Edit Account Information," scroll down to the Chapter field, and select "National Capital Area Chapter."

How much does it cost?

APMP membership costs \$125/year, payable by either check or credit card, and virtually pays for itself after taking advantage of membership discounts. Local NCA affiliation is FREE and includes exclusive access to business development professionals, job opportunities, Corporate Partners, and the NCA body of knowledge that contains presentations, newsletters, and the APMP quarterly newsletter.

How do I get involved in local chapter activities and committees?

Joining APMP and affiliating with the NCA will provide you with instant recognition as a business development professional with proposal management interests and expertise. The real benefits from APMP membership and NCA affiliation come from your participation and involvement in sponsored events and activities. Contact chris@apmpnca.org to find out how you can become a more active member and help shape the future of APMP-NCA and your professional career. Do it now and cross three things off the list that you've been meaning to do for quite some time.

Local NCA affiliation is FREE and includes exclusive access to business development professionals, job opportunities, Corporate Partners, and the NCA body of knowledge.

NCA Membership Profile

- 728 total members including 38 new members who joined last month
- General Dynamics has the largest NCA membership (31)
- Other top-5 companies include Northrop Grumman (26), Booz Allen Hamilton (24), CSC (19), and CACI (15)
- 25 companies have 5+ members each
- NCA Membership Committee Chairperson (Chris Simmons) is supported by 3 committee member volunteers

Newest Member Profile:

Lynn Ann Casey, CEO, Arc Aspicio (www.arcaspicio.com), specializing in management consulting for DHS

Say No More

Mike Walker

"Are you excavating a subterranean channel?" asked the scholar. "No sir," replied the farmer. "I am only digging a ditch." So goes the old joke. It's all too easy to get carried away with grandiose language (big words) and find yourself pushing against your proposal page limit. As proposal managers, we all too often see our management or technical volume come in at 10% or more over the page limit, leaving the editor, if you're lucky enough to have one, with the unenviable task of deciding what to cut and what to keep. On my last two proposals, the texts had to be severely edited to come in exactly on the limit. There's got to be a better way. I asked a few of my colleagues and fellow APMP-NCA members for their best advice on keeping it brief. Here's what they said.

1. Start with a completed storyboard, content plan, or annotated outline. Knowing what you're trying to say beforehand guides your writing and keeps you on point.
2. First, get all your ideas on paper, without interruption or editing. Then review each paragraph and try to summarize your main point in a single sentence.
3. Keep sentences short. Aim for an average of less than 20 words and stick to one main idea per sentence. Short sentences of clear, economical writing build into a structure of easy-to-read and understandable paragraphs of five or six sentences each.
4. Use active voice. "Our technician tests the system." is not only more convincing but is shorter and clearer than "The system is tested by our technician."
5. Review your text for duplication of meaning and ideas. It's surprising how often we say the same thing, just using different words.
6. Use simple words instead of complex ones. Not only is it shorter, it also makes your writing easier to read—for example, "so" instead of "consequently" and "skill" instead of "proficiency." Use longer words only when it's necessary for clarity or to convey your precise meaning.
7. Use one word in preference to bloated phrases of two or more. Use "now" instead of "at this point in time" and "about" instead of "in regard to."
8. Limit your use of adjectives and adverbs. In proposals, we write about people and things. Good writing consists of nouns and verbs. Make sure the adjectives or adverbs in your writing are needed and add meaning.
9. Have someone else review your writing (preferably before Red Team) to make sure the message is brief and to the point.
10. And finally, use graphics to communicate your meaning. A picture is worth a thousand words. Need I say more?

About the Author: Mike Walker is an international business development and proposal management professional based in Gambrills, MD. In addition to his proposal work, he has written numerous articles for Electronic Technology magazine in the UK and for the South China Morning Post and Hong Kong Standard newspapers.

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 contains such information as the:

- Job title
- Employer name
- Job description

- Employer contact.

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

Beginning on May 1, 2008, employers will be able to 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 rick@apmpnca.org or by calling (703) 263-9240.

Review your text for duplication of meaning and ideas. It's surprising how often we say the same thing, just using different words.

APMP-NCA

Professional Day

October 14, 2008



Professional Day 2008 will provide business development, capture, and proposal professionals with an opportunity to network with peers, and learn how to improve their success rate from respected industry leaders.

We are calling for presentations on the following topics:

- ❖ Success in Proposal and Capture Management
 - ❖ Techniques and Best Practices for Improving Success Rates
 - ❖ Metrics Programs for Measuring Success
 - ❖ Overcoming Obstacles
 - ❖ Implementing Quality
 - ❖ Your Suggestions:
-
-
-

If you are interested in becoming a presenter, please prepare a 250- to 500-word outline of your presentation and short bio by May 18, 2008. We are seeking four individual speakers and two panels (composed of two or more companies) to provide 45-minute presentations.

If you are interested in becoming a volunteer, we need help with the program, logistics, food, and publicity subcommittees.

Contact Professional Day Committee Chairperson, Brenda Crist at brenda@apmpnca.org or (301) 466-9566 with questions or submit your presentation outline and bio.

Make Life Easier—Teach Your Proposal Team to Write

Olessia Smotrova-Taylor

If the trickiest part of proposals was the process of preparing a compliant document with text and multiple graphics for submission, winning would be a lot easier. In the end, answering every requirement may prevent a proposal from being thrown out, but getting the win themes and subject matter expertise captured in hard-hitting text that speaks straight to the customer's needs is what makes a winning difference.

That winning prose is hard to produce. It takes a lot of time and effort and it causes prolonged suffering to everyone involved. Unfortunately, most pursuits do not get blessed with Stephen King-like engineers who can bang out several sections in a day, and they have limited budgets that don't allow hiring a band of consultants. So, how can you get your team to write well?

It is an uphill battle. Authors usually face time limitations due to juggling their “day” jobs with proposal assignments. They also suffer from lack of confidence in their writing skills, writer's block, procrastination, lack of exposure to basic writing tools and techniques, and bad habits such as indiscriminate reuse of old proposal text. Many people in technical professions seem to have the holy fear of writing the same way some non-technical people dread math.

The trouble is that proposal managers' common bag of tricks with annotated outlines, requirements-filled storyboards, and threats to enforce deadlines does just the opposite of getting people to free up their time and get their creativity flowing. Motivation, creativity, and inspiration originate from the place opposite of linear thinking, forms, and threats. This is why storyboards are scarcely useful and often get abandoned after their review, when the “real writing” starts. Storyboards actually come from the movie industry, and they are based on the script that is already written.

The writing process consists of three distinct stages: research, actual writing, and editing.

Motivation, creativity, and inspiration originate from the place opposite of linear thinking, forms, and threats.

This tool was not created for people who do not yet know what to write. Paradoxically, just starting to write or issuing section assignments without instructions leads to an even worse output than using storyboards. It is often a difficult and tricky leap a proposal makes from storyboards to a good first draft.

The solution for proposal managers is to help the authors make three shifts to becoming better writers:

1. Change the personal belief system about writing and one's own abilities
2. Gain understanding of the writing process
3. Learn basic writing tools, rules, and techniques.

1. Change The Personal Belief System About Writing and One's Own Abilities

Although seemingly hard to accomplish, the first shift does not require the likes of Doctor Phil to facilitate. During proposal kick-off or the initial just-in-time training session, it is important to dedicate some time to discuss the authors' disempowering beliefs about writing, so that people gain an awareness of them. As an

example, I ask people to raise hands if they believe good writing requires a special gift, and ask what they picture when they think of a good writer. It is amazing how many people, when they think of good writing, picture someone effortlessly whipping together clever sentences with adjectives and adverbs that are not part of an average engineer's day-to-day vocabulary.

To address the writing fears, I first explain that unless we were required to write iambic verses or haiku, there is no mystery to good proposal writing, nor does it require special talent. I ask them to forget all the adjectives and adverbs, and vocabularies full of sophisticated four-to-five-syllable words. Most of the time those words try to mask weak nouns and verbs and lack of substance, and end up as evaluators' laughing stock—

The solution for proposal managers is to help the authors make three shifts to becoming better writers:

1. Change the personal belief system about writing and one's own abilities
2. Gain understanding of the writing process
3. Learn basic writing tools, rules, and techniques.

If research is 40%, writing should be 20%, and revising and editing should take another 40%.

hence “world-class” is now “banned” from proposals.

I then ask people to stop themselves, even if just for the duration of the proposal, from telling themselves they are bad writers and this work is boring. With the negative self-talk gone, they have a greater chance of succeeding.

I also ask people to stop believing that writing has to take dedicated hours of quiet time. They usually postpone the writing project until that perfect time block is found, which is usually too late. I ask them instead to dedicate 15 minutes in the morning, and 15 minutes in the afternoon daily. I found that oftentimes, when people get started, they end up getting on a roll and do more than they had planned. I ask them to post their work daily so that I can see their progress. Even if people use only two 15-minute time slots each day, the quality of their sections improves because in the in-between times, authors get to percolate and generate new ideas. Plus, they stop dreading writing because it does not consume too much of their precious time.

Finally, I get to the real reason many people don't believe they can write well. They expect perfection. I ask the team to give themselves permission to write badly at first, and get away from expecting perfect prose in the first draft.

2. Gain Understanding of the Writing Process

Another culprit of painful proposal writing is lack of understanding of the writing process. The writing process consists of three distinct stages: research, actual writing, and editing.

When these stages are skipped, mixed, or tackled out of order, writing becomes painful and time-consuming. Starting to write before all the preparation, planning, and research are done is dreadful, because people do not like to feel like fakes and talk about things they know nothing about. If people are having a hard time starting their sections, it is often because they do not yet understand what the customer is looking for, what is being proposed, and why the customer should pick this team. Until this understanding

is reached, writing will not flow. The research, preparation, and planning of each section should take at least 40% of the time it takes to produce a final draft.

The mother of writer's block, however, is editing while writing. If you are one of the people who can recall spending a whole hour only to produce one or two sentences, you understand what I mean. It is hard to learn to write without looking back, but it is important to “bake the cake” first. It does not matter

if it is an ugly cake—it just has to be there in its fullness before the revisions can start. I ask people to repeat a little mantra—“I will have a chance to go back and make it better”—when they start changing words, or rereading what they just typed. They have to remember that writing does not end with the “writing” stage. In fact, proportionally, the time allocated to revisions and editing should be about twice as long as the writing itself. If research is 40%, writing should be 20%, and revising and editing should take another 40%. Knowing that usually relaxes inner grammarians and judges. It is important that proposal managers schedule proposal milestones correctly in light of the writing process to help your team along.

I also schedule just-in-time training and personal time with each writer to teach them research, writing, and editing techniques and tools. This is time and effort well-spent, because it cuts down on the amount of rewriting a proposal manager has to do.

Work packages used strictly as questionnaires and research tools are much more useful for this process than storyboards. They have to have the right types of questions in them and provide thorough explanations for what is required. I teach the team how to fill them out, and emphasize that work packages are not a writing tool, but an information collection bucket for the research and approach development notes.

In combination with brainstorming, they are an effective way to get the team prepared to write.

When the writing stage begins, I teach the proposal team techniques for section planning that are more effective than outlining or storyboarding. One method is to get all ideas and things that should go into a section on

... stop thinking that writing has to take dedicated hours of quiet time. ... dedicate 15 minutes in the morning and 15 minutes in the afternoon daily.

The research, preparation, and planning of each section should take at least 40% of the time it takes to produce a final draft.

This approach reduces pain, and the team has a lot more fun with the writing.

post-it notes without judging those ideas, and then move them around to figure out the order that makes the most sense—and what may be missing. Another one is to mind-map—to draw circles with all the points that need to be made, and get them to inspire other thoughts. Yet another is to use a chart similar to a dart board, where the win theme gets placed in the center, and the ideas and greater detail get filled out from the center to the periphery. Another technique is to create a key section graphic first, so the whole section can talk to it. The key to each tool is to not overuse it—these tools are meant to get the creative juices flowing, rather than becoming a goal in and of themselves.

3. Learn Basic Writing Tools, Techniques, and Processes

When the team gets to the revising and editing stage, it is useful to give a presentation on how to sharpen the flow of the sections and the language using simple techniques and automated tools available in Microsoft Word and online. Since editors frequently refrain from making in-depth content edits, it is the writers'

It is the writers' task to make their sections more readable before their sections go to the editors.

task to make their sections more readable before their sections go to the editors. One good technique to share with the team is how to reorder paragraphs so that the section makes a compelling argument, while remaining compliant. Beyond the obvious task of getting rid of the passive voice, it is also good to show how to shorten long sentences and three-to-four syllable words the evaluators are sure to stumble over. I also teach a proposal team how to make dull and wordy sentences into punchy short phrases.

This approach reduces pain, and the team has a lot more fun with the writing. It drastically cuts down the time writers charge to the budget to write a proposal and it leaves more time for other tasks. It also reduces a proposal manager's headache because there is very little rewriting, and the reviews are less bloody. And, finally, better written proposals are a lot more likely to win—and isn't that why we are all doing it in the first place?

About the Author: Olessia Smotrova-Taylor is president of OST Global Solutions, Inc. that provides capture and proposal management support and training to companies seeking to win business. Her other articles can be found at www.ostglobalsolutions.com.

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Executive Summaries—The Who, The What, and The Why . . . You Can't Live Without My Team!

Bob Weissman

Most people will suggest that you start with a statement like: “We are pleased to submit our proposal for...” Avoid that mistake. Nobody is sorry they submitted a proposal.

For all you future and current executive summary writers who have stared at a blank computer screen—or in my case, a blank sheet of paper in an IBM typewriter—my deepest respect, admiration, and hopes are extended. Hemingway said that “staring at a blank sheet of paper with a deadline is the scariest thing in the world.” This came from a guy who thought running through the streets of Spain with bulls chasing him was fun. No document receives a greater level of internal and external attention than the executive summary. Here are some challenges every executive summary writer encounters:

- We want the first draft before the kickoff meeting. Gee, that’s easy—the kickoff is tomorrow.
- I can’t start writing my technical/management section until your executive summary outlines the strategy. Never mind that a major element of the executive summary is the proposed solution.
- Every senior executive assigned to color teams, and most likely your boss, will critique the executive summary.
- Everyone has a better approach . . . or has read one they like better.
- My personal favorites—it’s not technical enough or it reads like you are trying to sell something.

So here we are, staring at a keyboard with everyone waiting for your masterpiece. No pressure here! Facing this, I always go back to the basics—Executive Summary 101.

The Who! Every customer needs to know who you are. Because most proposals are a collection of corporations of every size and set of skills, you need to describe your team. Most people will suggest that you start with a statement like: “We are pleased to submit our proposal for...” Avoid that mistake. Nobody is sorry they submitted a proposal. If you are not thrilled to be writing this document, save the trees, and don’t bid the job. You must quantify who you are. Even if you are on

the Fortune 100 list, it is unlikely that this customer knows the team you’ve assembled. Avoid using terms like “world class” or “outstanding.” Quantify your team with statements like: “The ACF contractor of the Year” or “the 2006 Malcolm Baldrige award winner.” If you can’t make such statements, try quoting a customer who loves you. Make sure you never use a customer’s statement that relates to Johnny or Sally (unless, of course, you are bidding Johnny or Sally). Use one that relates to your firm. If the prime contractor has neither awards nor customer kudos, you might want to rethink your chances of winning.

The What! So now we know who is coming to dinner. What are you bringing? Hopefully, it’s not a cheese log. What is it you have that the customer can’t live without? Somewhere in your capture effort, you uncovered what the customer wants but is not getting. If you do not know what it is before the RFP is released, I doubt you will uncover it during RFP review. If they want stability, give them stability. If they want a dynamic organization, try to figure out what that means and tell them that you are one. Use definable terms. If a definition is needed, give them one. The “What!” is critical to both your customer and your proposal team. Here’s why:

- Internally, you need to help your engineers explain their solutions. Most jobs no longer have benchmarks or live test demonstrations. Your words must demonstrate that the solution you propose meets your customer’s needs. Giving your people an understanding of the strategy allows them to tailor their sections and accent your team’s true strengths.
- Externally, your words will be the customer’s first impression of your proposal. The executive summary must provide your vision of how the solution fits the customer’s needs. Using a page or page and a half to answer the customer’s high-level challenges is a better way of demonstrating

No document receives a greater level of internal and external attention than the Executive Summary.

Don't listen to the cries of the technical staff trying to steal another three pages for their section. They always want more room, but your three pages are the summary of all things, and they cannot be left buried within the proposal for the reviewers to dig out.

customer knowledge than statements like: “Our team understands the goals and mission of the X YZ organization and the criticality of your mission to National Security.” Statements like that are boring and come across as puffery. Instead, state that your solution will reduce the issuance of green cards to undeserving applicants and thereby prevent unwanted aliens from entering the country. That statement ties together the customer’s mission with the organization’s higher level goal.

The Why! This is the most important element. Who cares who you are and what solution you bring if it doesn’t fix the customer’s problems. You have described who you are and what you bring, now finish the sale. The customer has read more than 1,000 words, seen a table or two and maybe a customer quote, and now says “So what!”

It is time to give them something to remember. You have met the internal needs by giving the writers what they need to proceed—now you must prepare a closing argument that will get past the scrupulous saints of the proposal world (aka: proposal manager and technical director), satisfy the business developer, and give senior executives something to crow about. Tough audience! You need to concisely explain why your team and your approach are relevant. In commercials and political campaigns, this is done in one sentence or two: “It’s The Economy, Stupid.” In our world, we have approximately 300 words. You must be selected because what you provide is exceptional and your strengths are the customer’s dreams. Besides simply stating the obvious, bring your solution up a level and match it with your customer’s higher-level mission.

If your customer processes immigration cards, tie your solution to the goal of immigration management, protecting national security, and giving legal immigrants the American dream. If your customer manages the national database of renal disease, relate your solution to helping our senior citizens live better lives. This sort of salesmanship says you understand the customer’s mission and the importance of its job. In a recent proposal, I explained that the results of modernization will ensure the

pension program data will be accurate and complete. So what? Everyone says that. But I substantiated that statement by adding related accurate data with Grandma being able to count on a pension check every month, giving her peace of mind so she can enjoy the retirement she deserves.

Tell Them What You Told Them! People’s memories are not the greatest. Summarize the offering and tell them they will find it in more detail in section ABC. Never forget to hit them with your best tagline at the bottom of the document.

Remember, the only document the source selection official might read is the executive summary. The only document every member of the color team reads is the executive summary. Don’t listen to the cries of the technical staff trying to steal another three pages for their section. They always want more room, but your three pages are the summary of all things, and they cannot be left buried within the proposal for the reviewers to dig out.

The executive summary is about clarity, brevity, and most importantly, readability. Your message cannot be boring, trite or difficult to understand.

Tell them, tell them again, and do it in as few words as possible. Remember Ben Franklin’s famous words: “I wrote you a long letter because I did not have time to make it short.” The executive summary is about clarity, brevity, and most importantly, readability. Your message cannot be boring, trite, or difficult to understand. Remember, it must have passion and purpose. It must tell the customer why they can’t live without you.

About the Author: Bob Weissman, cofounder of Clarus & Fidelis Consulting Corporation, has helped organizations win federal business for over 20 years. Mr. Weissman is a published novelist and an emergency medical technician in the Vienna Volunteer Fire Department.

Writer's Roundup—Organization

Patricia Kent

As promised, this ex-English teacher turned Proposal Manager is back! If you recall, I addressed a three-point check list for effective writing in the Winter 2007 edition of the APMP-NCA Executive Summary—organization, content, and grammar and style. That article concluded with the announcement that I would “be providing some ... deeper examination” in future articles. So if you are ready, this article, as well as the next, is dedicated to writing organization—a concept that I readily admit as being one of my obsessions because it is so important.

Over the years, I have noticed that just the mention of a writing assignment causes hair to bristle on the back of many writers’ necks and brain cells to freeze so thoughts stop flowing. The results are two-fold—first,

these writers procrastinate and, second, they spend precious time agonizing over sheets of blank paper or a computer screen where an annoying cursor keeps blinking. So, I am going to share with you a simple procedural “tonic” for this debilitating problem. In fact, it’s so simple, it’s ridiculously elementary.

But who cares—as long as it is effective and produces the desired results. The name of this special tonic is brainstorming, a term I’m sure you have heard but may have never associated with organizing proposal content.

Okay, here’s how to begin.

First, sit down with six items: a blank sheet of paper, a pencil with no eraser (erasing is not allowed), something to time yourself with, and at least three colored highlighters. Before setting the timing device, write the topic you must address at the top of that sheet. For example, the topic might be incident

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One rule says that anything you divide must have two or more parts. After all, you can't cut a delicious apple pie without creating slices—even if it is only half and half. The same goes for writing.

management, earned value management, or systems integration. Allow yourself five minutes, and in the time it takes to run out, write as many words or phrases related to that topic as you can think of. Oh, shucks! I almost forgot to mention

... you cannot organize/format what you write. That means no writing in straight lines across or in columns, and no erasing to correct spelling. Those words and phrases need to spread out over that paper like water out of a faucet—in a rapid and consistent flow. You're not in school. You're not lining up to go to the cafeteria for lunch. You're at recess exercising your escape from structure. Wow! Doesn't that feel great?

Okay, time's up. What you should have is a paper filled with information scribbled and scattered from top to bottom. Your next task is to select, mark, and break down those words/phrases into topic levels. Use a different highlighter color for each level. Begin by selecting and marking the words/terms that will become Level 1. Next, select and mark associated words for Level 2 concepts. Then, move to remaining words that you think might fit as Level 3.

Oh, you say you have run out of words? Or maybe you have words that don't fit anywhere? Then again, maybe you're missing some concepts. No problem. You are now in a position to add and delete from your random list. By drawing arrows or marks and linking the Levels, you should be able to see a pattern forming. And if you allow that pattern to work for you, it will become the outline that you need for arranging your writing content.

Of course, like any good outline, some rules apply. One rule says that anything you divide must have two or more parts. After all, you can't cut a delicious apple pie without creating slices—even if it is only half and half. The same goes for writing. If a level is worth dividing, it must have two or more sublevels. If a level isn't conducive to slicing, there is no harm in letting it stand on its own. Another rule is the order in which you logically address the topics. How should it be explained to the reader? What sign posts are you going to set up with those levels to optimize the reader's comprehension? If you are answering a procurement request (for example, an RFP/RFI/SOO), the order—even headings—may

already be decided for you. In that case, your objective will be to follow the instructions and prepare a document that evaluators can read and review easily.

But regardless of bid instructions, this brainstorming session, however rudimentary, is still an advantageous way to quickly prepare your topic content in a logical flow. And isn't that what you must have to complete those storyboarding assignments? Now you can beam with

satisfaction, knowing you already have the data to fill in the content section. Then, when you combine the appropriate theme statement(s), differentiators, and relevant graphics to your content list, you will have a good foundation for the first draft of that writing assignment.

So don't procrastinate, and don't stare at a blank computer screen wondering if those magical words will just appear. Instead, have some fun with this exercise. I am confident that the more you use it, the more at ease you'll feel when you get those last-minute or late-night calls for a writing assignment.

... Don't procrastinate and don't stare at a blank computer screen wondering if those magical words will just appear. Instead, have fun with this exercise.

2008

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What other topics would you like us to cover? What else would you like to see in this newsletter?

What Keeps You Up At Night?

Olessia Smotrova-Taylor

Are there capture and proposal issues you are facing right now that are keeping you up at night? Are there things that you feel business developers could do better? Are there any lessons learned to share with your colleagues? Write an article for this newsletter.

Write an article . . . it will benefit the whole community . . . enhance your career.

This will not only benefit the whole business development community, but will offer a great opportunity to enhance your business development career as a published author.

As a new Newsletter Chair, I also welcome the opportunity to get your feedback on the new look of the Executive Summary newsletter, and the articles in this edition. What other topics would you like us to cover? What else would you like to see in this newsletter?

Please, contact me at olessia@apmpnca.org or at (301) 384-3350 with comments, questions, suggestions, articles, and article ideas.

Mark Your Calendar for 2008 APMP-NCA Events

- May 27–30—APMP Int'l Conference
- June 6—Proposal Basics Boot Camp
- July 16—Roundtable
- September 17—Roundtable
- October 14—Professional Day
- November 19—Roundtable

Please Note: *There will be no Roundtable in May. The next Roundtable will take place on July 16, 2008*

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Largest Roundtable to Date

Brenda Crist

More than 200 new and existing NCA chapter members registered to attend our most popular roundtable to date: "Proposal Pictionary: How to Turn Your Words Into Pictures," presented by Mike Parkinson and Colleen Jolly, Principals of the 24 Hour Company.

Attendees learned we live in a visual world and process pictures thousands of times faster than words. To create the most effective



graphics, Mike and Colleen recommend following the "Picture Pyramid."

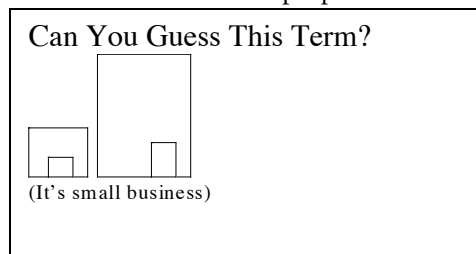
At the base of the Picture Pyramid you learn your P.A.Q.S.—Primary Objective, Audience, Questions Needing Answers, and Subject Matter. When you do not follow the P.A.Q.S. guidelines, graphics can mislead the audience or create unintended results. The second layer of the Pyramid emphasizes selecting one of four key methods for delivering graphics:

1. Literal Method—like www.google.com

2. Substitution Method—like exercise demonstration charts
3. Quantitative Method—like bar or pie charts
4. Assembly Method—like flow charts or diagrams showing phases.

The third level of the Picture Pyramid emphasizes using design techniques that are clear, clean, and concise; familiar; and easy to understand in an instant; and they use few words to communicate a message. The fourth level of the pyramid calls for "rendering", or generating an image. This is when the Proposal Pictionary Game began.

Mike and Colleen divided the room into two large teams and selected representatives from each team to draw a proposal term like



"write", "storyboard", or "fiscal year", while their teammates tried to guess the term.

Mike and Colleen must have been excellent teachers because our artists were able to convey their proposal terms using a picture 99% of the time, leading to one tiebreaker after another until one team finally won.

You can find the presentation slide deck at our website at <http://www.apmpnca.org/presentations.html>.

Back to the Basics

continued from page 2

We are fortunate to live in an area full of educational organizations. Universities, training companies, corporations, community organizations, and non-profits offer a plethora of necessary training on-site, at their facilities, internally, and over the Internet. Bookstores and the Internet burst with proposal, capture, and graphics development books and rows of software training manuals. Stop me at one of the NCA Roundtables, Proposal Basics Boot Camp, or Professional Day, and I'll be happy to share my personal favorites with you!

Bottom line, no matter how many years of experience we have in the proposal/business development field, there is always something

new we can learn or teach, some method or skill we can enhance into a best practice, and others who are new to our team whom we can help along their own career path.

To "borrow" from Robert Frost, "Two roads diverged in a wood, and I—I took the one less traveled by, and that has made all the difference."

How are you proceeding down your road? Spring is a perfect time to assess your progress, fill a few potholes, tune yourself up, and continue ambling down the road. Just remember to stop occasionally and enjoy those peeping crocuses!

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clowery@citizant.com

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request for a PayPal invoice for online payment).

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