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Executive Summary

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President's Corner

The Art of the Proposal Craft

Beth Wingate, AM.APMP

There's a logical transition from our June 6 APMP-NCA Proposal Basics Boot Camp to the theme of our summer Executive Summary—"The Art of the Proposal Craft." At our sold-out Proposal Basics Boot Camp, our knowledgeable NCA Corporate Partners shared their expertise in proposal writing, proposal coordination, and proposal management basics. Now it's time to explore these topics in more depth and realize that once you understand and master the basics, the fun begins in learning the "art" of our profession.

How do we go beyond the basics of developing merely "compliant" proposals to producing responsive, hard-hitting, concise, graphics-rich, elegant proposals written in one voice with truly "unique" value propositions and with truly "unique" win themes (ones our competitors really can't claim!) woven throughout? How do we develop the three-ring binders of content that we flip through the day after we deliver the proposal and say, "Wow! That really is a top-notch, good-looking proposal—how the heck did we do that?"

We then realize that it was the serendipity and synergies developed within our team—the real "magic and art" that comes from two essentials: 1) understanding everything that needs to go into the final product, and 2) putting in the effort that comes from deep down in your "guts" into everything you do to get that proposal out the door in the most professional manner possible.

The "art" comes in learning and understanding all the facets that make up an effective, efficient business development and proposal development process. It includes planning—developing an effective Capture Plan, executing the plan, and delivering the requisite work products to the proposal team. It comes from understanding all the pieces that compose a comprehensive Proposal Plan and learning how to develop those documents and plans—tailored to the size and complexity of the bid and your available resources.

The "art" involves recognizing the training, your capture and proposal teams need to do their jobs in the best way possible—then working to help them get that training and finally reinforcing the best practices they learn in all aspects of their contributions to the final products. The "art" also involves having the right tools, resources, support, and time to do a good job.

It took a genius like Michelangelo four years to paint the 300 figures on the ceiling of the Sistine Chapel, assisted by a large support team. It took Brunelleschi 25 years to build the dome of Santa Maria del Fiore in Florence once his "proposal" won the competition begun in 1418—which included some amazingly nasty infighting, teaming

agreements, subcontracting problems, reworking, scandal, and protests that make some of today's proposal competitions and contract management sagas look pretty tame. (Pick up a copy of Ross King's *Brunelleschi's Dome – How a Renaissance Genius Reinvented Architecture* for a fascinating summer read about how folks used to do proposals.)

Most importantly, in some respects, "art" takes total management support to be able to develop the very best capture and proposal plans and execute those plans to the best of your ability. There's a real "art" to educating your management on how best to support your business development goals and processes and cultivate that management support that you can learn on-the-job. But also (and perhaps less painfully) from the mentors, advisors, friends, and colleagues you develop over your career (especially among your fellow APMP members).

Finally, from a personal perspective, just as I learned to respect the intense heat of my pottery kilns when I reached into one with tongs to pull out a Raku-style piece I was firing, and my clothes spontaneously burst into flames (and understood there was a reason the instructor [read solicitation

instructions] strongly suggested cotton versus polyester clothes), or when the asbestos gloves I'd slipped on to pick up an 1,800-degree pot had a small hole in a finger and I ended up with a corresponding hole straight to the bone in that finger [read check all the details carefully before starting the response or going to final production], we need to learn the "art" of managing our proposal environment—from capture through post-proposal delivery and all of the myriad tiny details in-between—so that we don't get burned! The "art of the proposal craft" mimics the products of true artists and artisans throughout history—there's a lot of sweat, blood, time, and soul that goes into every great work of art…and every great proposal.

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Ask the Graphics Guru

Mike Parkinson

What is the difference between graphics for written proposals and oral proposals?

There are important distinctions between written graphics (graphics developed for Microsoft Word or Adobe InDesign) and oral graphics (graphics developed for Microsoft PowerPoint).

Oral Graphics:
Traditionally, oral presentations are graphic- heavy for a very good reason. Reading competes with listening. We want the audience to focus on the presenter. If your audience is reading text on the slide, then they are deciphering what the slide is trying to communicate and not paying attention to the presenter. This distraction can lead to miscommunication. If your audience reads your message and they understand your message, why should they listen to the explanation again? The result: your audience may tune the presenter out. To keep their attention, present your solution visually and use as few words as possible. Your audience will listen to the verbal explanation, while the graphics create an unforgettable picture of the solution.

Presentations are meant to be a visual tool that support the presenter by clarifying or explaining the solution in a way that is easy to understand and retain. Visuals do a fantastic job supporting these goals. Why? Visuals communicate up to 60,000 times faster than text, so your audience absorbs the information quickly and focuses on the presenter. Graphics are far more memorable than text—38% more memorable in fact. Graphics are instantly stored in long-term memory, whereas text travels through short-term memory to be stored. Graphics paint a clear picture. If we can visualize a solution, we are more likely to understand and, therefore, be influenced by it. The bottom line: presentations must be more engaging and stimulating to be effective, considering the attention

" ...use as few words as possible."

span of your audience. Text heavy slides work against your goals. Graphics give the presenter a distinct advantage.

So what makes presentation graphics unique? The following is a list of the biggest distinguishers:

1. **Font size.** Fonts need to be large enough to be read in the back of the room. Guy Kawasaki uses the following amusing rule of thumb: take the oldest person in the room and divide the age by two. That is the smallest font size—14 point being the smallest. Be aware that different fonts are different sizes so 14-point Arial is larger than 14-point Times. If possible, read the slide at the maximum distance to verify legibility.

2. **Font choice.** Either embed the font or use a ubiquitous font like Arial or Times to avoid font substitution. If the computer used for your presentation does not have the font you choose, the software switches the font for a similar font, which often results in misalignment, lost text, overlaps, and software hiccups.

3. **Resolution.** In most instances, lower resolutions are adequate for presentation graphics. For example, most printed documents are 300 dpi; however, depending on the final medium delivered, presentations range from 72 dpi to 300 dpi. I find that 200 dpi looks great in print and on screen, and I normally use 200 dpi for my slide graphics, while 72 dpi is suitable for online presentations.

4. **Real estate/dimensions.** PowerPoint slides are typically 10 x 7.5 inches, but this dimension will change as we switch over to wider screens (the aspect ratio is shifting from 3:4 to 9:16). The slide must include titles, bullets, graphics, page numbers, tables, and more, and use larger imagery and fonts to accommodate your venue and audience. Larger venues, greater distance, brighter lighting, and audience age (or special needs) require larger graphics and fonts.

5. **Text length.** Be more succinct for two reasons. One, too much text equals smaller font size, making it difficult for your audience to read on

Nonproprietary slides

screen. Two, more text also means your audience will read the slides and not focus on the presenter.

6. **Complexity.** Because you want to make it easy for everyone in the room to see and understand, presentation graphics should be simple and easy to follow. Visual noise (such as many lines/arrows, too much detail or descriptive text, and large legends) makes it difficult for your audience to digest the graphic. Explain the concepts at the highest level possible in an oral graphic. Unfortunately, you may need to put the sun, moon, and stars on a slide thanks to (shall we say) "extreme" RFP requirements. So, include what you must and remember that the more complex your graphic, the more likely your graphic will fail to achieve its primary objective.

7. **Pacing.** The length of time your audience has to digest a slide affects the amount of content included. Less time means less content. If you know your presentation will be left with your audience for further review, be sure to make the takeaway blindingly obvious: use audience-focused titles, benefit boxes, and "bumpers" (text at the bottom of each slide that summarizes the slides, primary objective), and remember to highlight your discriminators.

8. **Potential to use animation or interactivity.** Animation and interactivity are effective tools when sharing information. Presentations allow for builds, reveals, and clickable elements. All of which, if used wisely, are powerful communication tools. But, be sure to use animation for clearer communication and not because it looks cool. (I call this "dancing baloney.") Your audience will be distracted by something that does not help the presenter achieve his or her goals.

9. **File type.** I found that JPGs, PNGs, or WMFs work best for oral presentations.
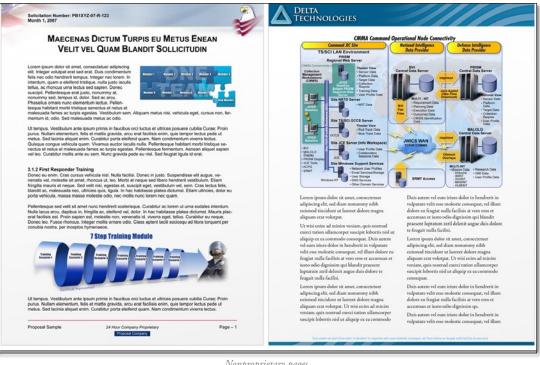
Written Graphics:
Written graphics are a reader's best friend. Readers, evaluators, and decision makers have fractured attention spans. With very few exceptions, your readers want to get what they need and close the proposal. If your readers need to find your features, benefits, and discriminators in a sea of text, then you increase the likelihood that your proposal will lose.

Graphics make it easy to find and remember what is most relevant and important to the reader. Written graphics also break up the monotony of page after page of text. Most evaluators are not eager to pour over every word of your proposal. They would rather be home, at a baseball game, watching TV, or almost anywhere else doing something else. In fact, most proposals are not read; they are scored. Graphics make it easy for evaluators to score your proposals. Here's a secret: evaluators like you to make their job easier. I have interviewed many evaluators, and all say the same thing, "Make it easy for me to choose you." Graphics are the best way to do this. Well thought-out and well-rendered graphics are preferred by all evaluators. It makes their job easier, and they are happier when good graphics are used to communicate the solution they need. (I'm sure you can see the benefit of making your evaluators happy, right?)

but you cannot figure out what "Dawn of Time" is about because all you can find is the script online. You are more likely to choose the movie you understand rather than the unknown movie (assuming you are a Harrison Ford fan). The same is true concerning solutions for your future clients. They want the 10,000-foot view of your solution from which they can drill down. Written graphics boil solutions down into digestible chunks.

Now, let's take a look at what makes a written graphic unique. The following is a list of the biggest distinguishers:

1. **Font size.** Because your readers will have time to study your graphic in detail, fonts can be smaller. I recommend no smaller than 8 point, and the Arial font family (sans serif text) works best in graphics.

Nonproprietary pages

Written graphics also help writers quickly communicate their solutions, which is critical. Evaluators are like you. When making a decision, you prefer an overview first. If needed, you can research further for more information, but typically your mind is made up without mountains of data. For example, you want to see a movie. You know nothing about two new movies, "Age of Dawn" and "Dawn of Time." You don't need to read the script; an overview would suffice. You find out that "Age of Dawn" is a thriller about the end of the world, starring Harrison Ford,

2. **Resolution.** Print is a higher resolution than on-screen presentations. For this reason, I recommend 200 to 300 dpi for your written graphics. (The greater the detail in your written graphics, the higher the resolution should be.)

3. **Real estate/dimensions.** Written graphics are constrained by page size and margin width. For example, an 8.5 x 11 inch page with one-inch margins requires that the graphic width equal no more than 6.5 inches. You also have the option of making

the width smaller and wrapping text around the graphic. Alternatively, two-column page layouts give you the flexibility to choose between single- or double-column wide graphics.

4. **Placement.** Place the graphic directly next to the text that speaks to it. The farther your graphic is from the referring text, the more work for the evaluators and the more chances for miscommunication.

5. **Text length.** As opposed to oral graphics, written graphics can be more verbose; however, text-heavy graphics defeat the benefits and influence that visual communication offers. Readers are conditioned to expect graphics without large amounts of text.

6. **Complexity.** Relative to oral graphics, written graphics can contain more detail; however, complex, dense graphics often fail to achieve the goal of the graphic. Less is more. Provide only enough information to satisfy the evaluator's needs. Allow the content of your proposal to add more detail or use an overview graphic and drill down on subsequent graphics. Highlight parts of the overview graphic and use a blowout to link the details to the overview graphic. Think of the overview graphic as a map or story that explains your solution. If needed, your audience can page to the appropriate section to learn more.

7. **File type color.** Most written graphics are either JPGs, TIFs, BMPs, or WMFs. When developing graphics, you have a choice between RGB (Red, Green, Blue) and CMYK (Cyan, Magenta, Yellow, and Black). I recommend using RGB JPGs because RGB files use one less color channel, and JPGs are smaller than most file types, while still offering greater flexibility.

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How Effective Is Your Capture Process?

Olessia Smotrova-Taylor

The art of winning proposals lies predominantly in mastering the capture process. Capture to proposal management is what attending the course is to passing the final exam in a law school that's graded on a curve. If you attended the course during the semester, passing the final using your great exam-taking skills may just get you that highest grade. If you did not attend the course, scoring high on the final, no matter how you may excel at taking exams, is a risky gamble. If you have done little or no capture, no matter how skilled your proposal manager or writer is, they cannot wing it for you.

Companies that do very little capture, or jump at pop-up opportunities, end up spending huge business and proposal development budgets on something they should have never chased in the first place. They burn out their business development staff. This staff has no time to do capture and marketing since they are busy on proposals. The team spends the entire business deveopment budget early in the year, preventing the company from bidding on other RFPs. Additonally, submitting losing proposals one after another is a sure way to lose face with the customer.

The most frustrating thing of all, however, is when a company seems to do all the right things, such as learning about the opportunity early and following a capture process, only to scramble during the proposal as if there were no preparation. Losing only adds insult to injury. Why is it so many companies with established processes end up in this predicament?

The "secret sauce," or the art of capture, is to stop focusing so much on completing the steps of the capture process—capture plan slides to fill out, reviews and steps to complete, and meetings to conduct. Instead, focus more on the desired outcome of the whole effort. When people think capture, they typically think of what they should offer, what their win themes should be, how they could outdo or ghost the competition, whom should they talk to in order to build a team, and how to best plan for the proposal effort. Sure, all of these are necessary, but often focusing on these very activities makes people mistake movement for progress.

The driver of capture should not be the steps of the process, but rather the strategy that gets you to answer three questions:

1. **What would it take to win—what would a potential winner have to have to make it an obvious choice from the customer's standpoint?** You must define every aspect of what the customer would ultimately desire, whether you have it or not at the moment, and visualize and document your desired outcome as if it were an ideal world.

2. **Where are you now?** You should assess where you are in comparison to that ideal winning scenario.

3. **What are the steps to get you there?** You must come up with a plan and a schedule of activities predicated on getting you from where you are now to where you need to be in an ideal situation in the fastest way possible.

Then, and only then, your capture process becomes meaningful. It is your focus that makes all the difference. Instead of asking "what steps do I need to take to get through the capture process?" clearly define the purpose first, then describe in enough detail the desired outcome. Next, assess where you are and apply the steps from your normal capture process to serve this outcome. You may repeat this exercise as you discover more information in the course of your capture effort. This is classical strategic planning. This is also the path to efficiency, since all your efforts are naturally focused, rather than being scattered without a precisely defined purpose. If you are looking to win more proposals, allocate over half of your budget to capture. To make your capture more effective, shift your focus from process to strategy. It may just do the trick.

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"Capture to proposal management is what attending the course is to passing the final exam in a law school that's graded on a curve."

The Art and Science of Time Management

Chris Simmons

"Time" has been one of the most talked about topics since the ancient Egyptians established the 24-hour day a long time ago, and it continues to be a popular and increasingly diverse topic today. My recent Google search yielded a whopping 63 million hits on time management subjects that ranged from time-and-motion studies to self-help. It is no coincidence that when asked about the most significant issues and challenges proposal professionals face, the responses most often mentioned are related to time. "Not enough time to respond"… "no respect for proposal schedule deadlines". "limited resources that increase time pressures," and the list goes on, and on, and on.

It's a fact that before most proposal efforts start, precious days (and sometimes weeks) are wasted away. Capture managers are either struggling to get a bid/no bid decision or securing the resources to kick off the proposal. To make matters worse, most proposals require accelerated development schedules (15-30 days) with little or no regard for the people managing, writing, and supporting the proposal. The challenge of creating a compliant, compelling response to an RFP becomes a daunting task apparently doomed for failure even before it begins— largely because there isn't

enough time. With so much time wasted and such little time to respond, proposal teams sacrifice their nights, weekends, and (in too many cases) even their health, just

to get a competitive product out the door on time. What's a proposal manager to do?

Unfortunately, there isn't enough time to describe all the ways you can better manage your proposal. I have time management challenges of my own and so do you! In the interest of time, here are seven high-impact recommendations (with specific action-oriented tips for each) that are guaranteed to help you get more out of your next proposal effort in less time.

"...up to 15 percent of the total proposal development schedule should be allocated to carefully planning the kick-off meeting..."

1. **Set ground rules early and often.** Thorough planning is one of the cornerstones of managing time efficiently and effectively. Most teams rush to kick off the proposal before they are really ready. However, experts agree that up to 15 percent of the total proposal development schedule should be allocated to carefully planning the kick-off meeting. That means 4-5 days after RFP receipt for a 30-day turnaround schedule. The kick-off meeting should include a detailed Proposal Management Plan already reviewed and approved by both the capture and proposal teams, with emphasis on the calendar/schedule, resource assignments, daily stand-up/status call logistics, and rules of engagement.

   Tips:

   • Select a proposal development methodology and approach that takes current proposal priorities and constraints into account. For example, three color reviews can work for a 30-day schedule, but usually not for a 15-day schedule.

   • The industry average for writing new proposal narrative is four pages per day. If a 40-page section is assigned to a writer with only five days to complete the task, you either need to request another full-time resource or agree that the

section will be based primarily on boilerplate (not recommended).

- Set daily stand-up calls for an off-hour time that is generally convenient for all participants to avoid rush hour traffic and to take additional time zones into account (if applicable). For example, stress the importance of being in the room or on the 3:05pm call five minutes early at 3:00pm. If you start the meeting on time, every time, people will get the idea that you mean business and that showing up late wastes everyone's time.

" Organize the work into small, manageable chunks."

2. **Organize the work into small, manageable chunks.** One waster is letting proposal teams go off for days at a time to start writing before: 1) agreeing on how to interpret the requirements; 2) developing an outline compliant with the instructions, and 3) sufficiently discussing and documenting a compliant and compelling solution that addresses customer evaluation criteria and hot buttons. The proposal management plan should include a number of iterative steps in the schedule designed to keep everyone on track and on time. Specific proposal milestones should include RFP review meetings, RFP Q&A meetings, outline reviews, solution development meetings, storyboard/module plan reviews, story map reviews, interim peer/ proposal management reviews, and color (Blue, Pink, Red, Green, Gold, and White Glove) reviews. It's the proposal manager's job to make sure individual team members achieve milestone deadlines, and it's the proposal team members' responsibility to let the PM know that they can't make the deadline and why.

Tips:

- Set the expectation in the kick-off meeting that pens-down deadlines are for the last section submitted.

- Avoid a COB deadline that can be interpreted many different ways and can lead to late-night typing and thinking errors.

- Stress specific deadline times (more specific) in addition to deadline dates.

- Work with individual team members to agree to specific deadline times with the easiest sections completed one to two days before the pens-down deadline for the last section.

3. **Focus on daily status at stand-ups.** Let's face it! Many of us are still kids in adult bodies, and sometimes proposal managers are reduced to the role of glorified babysitters. Like most kids, proposal team members will test the limits of authority to see how much they can get away with.

Tips:

- Your daily stand-up meeting should include a status summary that includes each section/sub-section; with a simple color coded status indicating how each section is tracking according to plan. The meeting should include a review of action items with specific owners and dates.

- If deadlines are not met, or if the quality of the deliverables is not up to your standard, the status summary becomes a "sheet of shame" that is posted on the war room wall, included in the electronic status report folder, and a daily reminder at stand-up for all to see.

- If a deadline is missed, you should schedule a "time out" with your team member to discuss the specific circumstances and confirm your mutual understanding of what happened. Decide to reset expectations (most often his/ hers), consider a reassignment, or if the problem continues, see recommendation #5 below.

4. **Keep interactions short and to the point.** Most people dread the idea of going to meetings. It's no wonder because most meetings are poorly managed, take too much time, or are altogether unnecessary. If a formal meeting is in order, identify

the target audience in advance and check attendee schedules before sending a meeting invitation.

Tips:

- Include an agenda with specific time allocations for each topic according to current priorities.

- Manage the meeting according to the agenda, and schedule to finish early enough to review action items, owners, and due dates.

- Keep all conversations (formal and informal meetings) focused and action oriented. Look for ways to avoid or prevent in-depth personal conversations while on the job.

- Talk to habitual violators individually, and consider separating or moving team members to another location.

5. **Don't hesitate to escalate.** A big part of having enough time to successfully complete a quality proposal is making sure the right resources are in place to do the job. There are all sorts of resource mismatches to make the process painfully inefficient—for example, the right people in the wrong roles, the wrong people in the wrong roles, not enough people in key roles.

Tips:

- Make sure the proposal kick-off meeting includes a proposal organization chart with clear lines of authority and a description of the roles and responsibilities of each team member.

- Avoid scheduling work on weekends and holidays in the initial proposal schedule, but prepare yourself and your team to work them if (when) it becomes necessary.

- If the right resources are not in place, raise the issue with the appropriate proposal, capture, or business development manager. Explain the benefits of making resource adjustments

and the risks and trade-offs of not making them.

- Provide decision makers with options and resource alternatives to reset expectations if necessary.

6. **Communicate, communicate, and communicate some more.** It simply cannot be emphasized enough that the most effective way to manage your proposal time is efficient and effective communication. When to listen, when to speak, what to say, how to say it, who to say it to, and when to say it. One of the most common proposal-team problems is the inability to communicate even basic ideas. All too often, incorrect assumptions, miscommunications, or a simple lack of communication lead to lost opportunities for success.

Tips:

- Proposal war room walls, meeting minutes, and status meetings can be effective management venues, but they are usually no replacement for simply walking around. On the surface it may seem like a time waster, but this simple act is likely to uncover potential miscommunication landmines. This management approach demonstrates your interest in individual team members and makes the communication channels more efficient and effective.

- Know what method of communication to use and when. For example, use tools available to you such as documentation management software like SharePoint, but don't rely on email messages and file downloads to accomplish what a simple telephone call or "How is it going?" visit can do.

- Answer telephone calls with a return call (not an email message) unless an audit trail is otherwise required.

- Avoid instant message-type email messages that go back and forth multiple times. Pick up the telephone and have a real-time conversation.

"Communicate, communicate. . . communicate."

- It goes without saying that you should never, ever send a chain-mail, joke mail, or other non-work related email message to your team.

7. **Make it better for the next time.** Even the most prepared and organized teams with highly skilled and qualified staff fail to win new business. Why? There are simply too many variables in the process to guarantee success—even if the proposal team remains constant. Despite what might seem like the same old people doing the same old things every time, each proposal effort has important and valuable lessons that can be learned and applied to the next proposal to make the experience more rewarding (getting it in) and successful (getting the win).

Tips:

- Take the time to document lessons learned throughout the proposal development process. For example, organize your thoughts across people, process, and technology dimensions with recommendations for future improvements.

- Look for opportunities to solicit written feedback on your performance and the performance of individual team members to determine what they can do better or differently, or whether they simply should

not be considered for similar assignments in the future.

- Take the time to reflect on the strengths and improvement areas of your proposal effort. Summarize your thoughts in action-oriented recommendations.

- Present your findings to the appropriate capture or business development managers and suggest a time to discuss.

- Make the proposal lessons learned activity part of your standard process for every proposal and integrate it with the proposal debrief, if applicable.

When I got myself into trouble growing up, my dad would often ask, "are you part of the problem or part of the solution?" On your next proposal, take some time, apply these tips, and make time part of your solution...not part of your problem.

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.

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.

Legal Corner: Is One Picture Really Worth A Thousand Words?

Shlomo D. Katz, Councel, Brown Rudnick LLP

Conventional wisdom holds that well-placed drawings, photographs, graphs and/or charts enhance written presentations, including proposals. Nevertheless, seasoned proposal professionals know that indiscriminate use of graphics can detract from an otherwise well-composed submission. Such proposals not only waste the preparation resources, they also inconvenience the reviewers.

Perhaps that is why many federal government solicitations include a clause cautioning against submission of "unnecessarily elaborate proposals." For example, the careless use of graphics can even spell legal trouble for offerors. In more than one instance, a losing bidder has challenged an award to a competitor because the graphics in the winning proposal appeared to contradict the written text of the proposal. While most such protests have not succeeded, offerors can still learn lessons from these challenges. Below are several examples of bid protests that resulted from careless use of graphics.

In one case[1], the solicitation sought a brand name or equal 450-watt public address system. Two proposals were received; both offered a 450-watt system that met all salient characteristics of the brand-name product. One proposal offered the "generic" system (Telectro) at half the price of the brand-name product (AEM), and the Army selected the generic system. The brand-name offeror protested, asserting that the winner's proposal included a photograph of a 900-watt public address system, not the 450-watt system requested by the Army. In fact, the generic offeror had included a picture of the brand-name offeror's commercially available 900-watt system. Accordingly, the protestor argued that the winning offeror's proposal was ambiguous as to what was actually being offered. The General Accounting Office (GAO—now the Government Accountability Office)—denied the protest. GAO explained:

> In our view then, and in the Army's, the only reasonable interpretation of

"Many federal government solicitations include a clause cautioning against submission of 'unnecessarily elaborate proposals.' "

Telectro's bid was that even though the firm included the wrong picture in its literature, the firm's intent to furnish the 450-watt system described was clear and unequivocal, so that the acceptance of the bid legally would bind Telectro to supply such a system. Since the literature also established that Telectro's own model was equal to AEM's in terms of the necessary characteristics (AEM does not dispute this point), the bid properly was found responsive.

As to AEM's suggestion that Telectro copied from AEM's literature, we have compared Telectro's literature with the protester's and in fact the narratives and 900-watt pictures are practically identical. Nevertheless, even if Telectro created its data by resort to AEM's, the firm's bid technically was responsive as discussed above. . . Moreover, the record shows that the Army conducted a comprehensive survey of Telectro's facility and capabilities and found the company responsible, that is, capable of furnishing equal items if awarded the contract.

For Telectro, the generic offeror, the procurement, and the bid protest had a happy ending. However, agencies have a great deal of discretion in evaluating proposals, and the Army might well have been within its rights to penalize the generic offeror for sloppily including a picture of a non-responsive system—a competitor's system—in its proposal. This may be of even greater concern today with the prolific access of Internet clipart and other images. While it may be tempting to download and use a picture that "almost" fits the proposal, proposal teams are urged to use caution.

In a second case[2], the winning proposal included a bar graph that showed projected deliveries under the contract occurring one month later than required by the solicitation. In evaluating the proposal, the Navy treated the discrepancy as a typographical error and corrected it. An unsuccessful offeror protested, arguing that the offer

"While it may be tempting to download and use a picture that 'almost' fits the proposal, proposal teams are urged to use caution."

was non-responsive—that it took exception to a requirement of the solicitation, and was therefore ineligible for award. Again, GAO denied the protest by explaining:

> *We find that the mistake and intended delivery were ascertainable from the proposal itself, based on four factors: (1) the discrepancy was present only in a bar graph presented to summarize the delivery times for numerous line items; (2) the discrepancy consisted of a bar graph line that extended 35 months instead of the required 34 months, a mistake that could be made inadvertently; (3) the proposal stated in the text that E-Systems would comply with the delivery requirements; and (4) the proposal nowhere else took exception to the delivery requirements. We think the agency properly concluded that the discrepancy was essentially a typographical mistake that occurred inadvertently when the bar graph line was drawn, and that E-Systems did not intend to take exception to the delivery requirement.*

As as a result, the careless offeror did not lose its approximately $25,000,000 contract. Likewise, in a third case,[3] GAO found that the agency had reasonably attributed several inconsistencies to typographical errors. However, it is easy to see how GAO might have ruled otherwise. Or, again, the agency could have used its wide discretion to evaluate proposals to conclude that the offeror was not unambiguously committing to the required schedule or product, or that the offeror was a sloppy contractor with whom the agency did not want to do business.

Finally, in a fourth case,[4] a losing offeror protested a competitor's award of a lease for office space. Specifically, the protestor asserted that inconsistencies in the winning offeror's proposal included differences between the text and a floor plan. Here GAO denied the protest on several grounds; one was that "the protestor's own offer suffers from the same flaw." Here the lesson is clear. While accuracy in a proposal is important, offerors who live in glass houses should not file bid protests.

In each of the above cases, the text of the offeror's proposal indicated that it would comply with the contract's requirements, and only a graphic raised doubt about the offeror's intentions. In all of those cases,

GAO gave more weight to the text of the proposal than to a non-compliant graphic.

What about the opposite situation, where the picture suggests compliance and the text does not? Those were the facts in a protest involving award of a contract for military transport using "self-sustaining" refrigerated shipping containers.[5] The solicitation sought a contractor to transport food to military personnel at Guantanamo Bay and required that the offeror propose refrigerate shipping containers with power sources separate from the ship's power source. The winning bidder included in its proposal a picture of a compliant container, but the text of the proposal clearly implied that the containers did not, in fact, have independent power sources. In that case, the United States Court of Federal Claims said it was unreasonable for the contracting officer to ignore the text and rely on the picture in making award.

So, is one picture really worth a thousand words? Yes, argued the Army contracting officer in the shipping case. However, as the above cases "do" show, a picture or other graphic will unlikely ever save the day when a proposal is otherwise not deserving of award.

Ultimately, proposals are not about beautiful pictures, charts, and graphs; rather, the job of the proposal is to answer the questions that the solicitation is "asking" and prove to the customer that you (or your client) can deliver what the customer wants, when the customer wants it, and in the manner or at the price that is the most advantageous.

Endnotes:

1. Applied Electro Mechanics, Inc., B-214673, 84-2 CPD ¶ 271 (1984).

2. Dataproducts New England, Inc. et al., B-246149, 92-1 CPD ¶ 231 (1992).

3. NABCO, Inc., B-293027, 2004 CPD ¶ 15 (2004).

4. Mecca Investments, L.L.C., B-277375, 97-2 CPD ¶ 95 (1997).

5. Transatlantic Lines LLC v. United States, 68 Fed. Cl. 48 (2005).

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.

How to Have a Dream Career in the Proposal Industry

APMP

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www.apmpnca.org/announcements/071608_roundtable

**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.

Membership Corner: APMP Membership Value Increases

Chris Simmons, NCA Membership Chair

During the annual conference in Rancho Mirage, the APMP Board decided on a number of changes designed to increase the value of APMP membership. In the near future, access to the APMP Body of Knowledge will be limited to APMP members only. To provide higher value to our local chapter members, NCA will soon implement the same restrictions on the NCA Web site. This means that if you are an APMP member, but have not affiliated with NCA, you will miss out on the following benefits:

- Access to current and back issues of our quarterly e-newsletter, *Executive Summary*

- Proposal business tools, articles, membership lists, and online versions of our educational programs including Roundtables, Professional Day (Annual Regional Conference), Proposal Basics Boot Camp, and more

- Affiliated member discounts for Roundtables, Professional Day, Boot Camp, and future events

Please follow these instructions to affiliate with NCA today:

Log in to the APMP Web site (www.apmp.org)

1. Select "View Account Detail"
2. Select "Edit Account Information"
3. Scroll down to the Chapter field, and select "National Capital Area Chapter"
4. Select "Save"

Thank you for your continued interest and participation in APMP and local NCA Chapter events. If you have any questions about affiliation or local Chapter event or committee participation, please contact Chris Simmons at chris@apmpnca.org or call him at (202) 255-2355.

NCA Membership Profile
(as of June 1, 2008)

- 129 new members since January 1st

- 763 total members (603 affiliated, 146 non-affiliated, 14 other)

- General Dynamics has the largest NCA membership (31)

- Other Top-Five companies include Northrop Grumman (28), Booz Allen Hamilton (21), CSC (20), and CACI (17)

Mark Your Calendar for 2008 APMP-NCA Events

- July 16—Roundtable "How to Have a Dream Career in the Proposal Industry"
- September 17—Roundtable
- October 14—Professional Day "Measuring Success"
- November 19—Roundtable

19th Annual APMP International Conference May 26-30, 2008

Global Positioning Strategies for Capture and Proposal Professionals

Beth Wingate, AM.APMP NCA Chapter President

The luxurious Westin Mission Hills in Rancho Mirage, California hosted APMP's 19th Annual International Conference May 26 – 30, 2008. A literal oasis in the middle of a desert surrounded by mountains, the site offered conference attendees the opportunity to relax in its peaceful surroundings or enjoy many sight-seeing opportunities after their fully packed days. The conference began with the First-time Attendee Orientation on Tuesday afternoon, followed by a Keynote presentation on Wednesday morning by BJ Lownie and Jon Williams of Strategic Proposals. That particular session had all of us in the ballroom on our feet and chatting madly with our fellow participants in a "speed networking" session to the point that we didn't want to stop visiting with each other. The remaining three days of 60 conference sessions focused on proposal and capture management.

The Westin Mission Hills featured abundant fountains, pools, and relaxing vistas where conference attendees could enjoy a brief respite from BD activities.

My favorite conference sessions focused on the international aspects of our business and how important it is to tailor your business development processes to your particular environment and capabilities. Chris Rademeyer from South Africa kept us spellbound as he explained how Deloitte & Touche and other companies in South Africa had to completely change the way they did business after the fall of Apartheid—and how they faced an initial challenge of having to produce proposals in multiple official languages simultaneously, including English, Afrikaans, Zulu, Xhosa, and Tswana!

Nigel Denis from Australia's The Proposal Company had all of us drooling and daydreaming as he presented "Ten Tender Tricks When Time is Tight"—a presentation interspersed with gorgeous pictures of the Aussie fun-loving lifestyle (beach, boats, eating, relaxing), combined with his methods to ensure that proposals don't interfere with leisure time! Nigel was amazed when listening to a group of us one evening by the pool discussing the challenges of successfully producing fast-turnaround task order proposals worth $30–100M in five days and still remaining sane. He promised we'd become legends in Australia once he returned home and shared our tips and hints!

The main swimming pool area hosted a number of Chapter meetings and exhibitor-sponsored social/networking events.

We held a very productive APMP Chapter Chairs (Presidents) meeting with the APMP Board of Directors to discuss issues and opportunities to further the goals and mission of our association and our individual chapters around the world.

The Board presented new initiatives to conference attendees during a general membership meeting. As with other international professional organizations, APMP is making it easier for members to afford dues and Foundation-level accreditation in lower-income economies by instituting a tiered membership schedule based on World Bank groups of countries by income. Because the United States is a Tier 1 country, our membership rate will remain $125/person.

APMP announced the formation of four new chapters, Florida Sunshine (virtual chapter), DACH (Germany, Austria, and Switzerland), Central Texas (Austin/San Antonio), and Lone Star (Dallas/Ft. Worth), and presented the chapters with their official gavels.

Surroundings such as the villa area's ponds turned the daily trek to the conference ballrooms into an enjoyable stroll (at least in the early morning before the 95+-degree heat hit!).

We have also begun a new grant program to assist chapters with funding for special activities. A portion of our membership dues will be set aside to assist with projects such as helping potential members to found a new chapter or assist existing chapters with establishing chapter seminars/programs (such as the NCA Chapter's recent Proposal Basics Boot Camp on June 6) or to create/improve a chapter web site or newsletter.

The Board also updated us on the status of the APMP professional accreditation program. Worldwide, we now have 1,000 Foundation, 200 Practitioner, and 30 Professional accredited individuals. As I mentioned during my opening remarks at our NCA Proposal Basics Boot Camp, you must earn continuing education units (CEUs) each year to maintain your accreditation (NCA's Boot Camp provided 5 CEUs). Cathy Day will be send an email soon to accredited members requesting copies of their personal CEU logs. APMP is recruiting a full-time U.S.-based Accreditation Program Coordinator to assist members with their accreditation questions and issues.

APMP also announced the BD-Knowledge Base™, jointly developed with the BD-Institute. This is an indexed collection of best practices artifacts from the APMP Journal, past conferences, and other parts of our body of knowledge. It will become a reference work for the APMP accreditation program, and the BD-CMM® knowledge will be integrated into the accreditation program in Q3 2008. APMP created a BD-Wiki for collaboration

and development of best practices. The link is available on the APMP website member page.

Keeping up with the times, APMP announced "APMP Podcasts" on capture and proposal topics are now available on our website. Written and narrated by the Proposal Guide, a.k.a. Larry Newman, APMP Fellow and author of the *Guide for Business and Technical Professionals*, podcasts include Compliance vs. Responsiveness, Customer Focus, Capture Planning, and Clear Proposal Writing. Plans are underway to post these podcasts on iTunes.

Conference attendees enjoyed breakfast with each other and traded "war stories" and advice each morning before the conference sessions began.

We will also begin a series of APMP Forums on the APMP website. Initial forums will cover accreditation levels, proposal processes, proposal production, etc. Any APMP member will be able to start a thread within a forum, and any member can reply to a thread. Non-members will be able to read a thread.

Scott Hiles, Brenda Crist, and Beth Wingate discuss ways SpringCM's Privia product is used by the NCA Board.

Chris Simmons, APMP-NCA Membership Chairperson, announced in an email to our Chapter in mid-June that APMP will soon move body of knowledge pages behind a "members only" wall. This includes the APMP *Journal* and APMP *Perspective* archives, APMP glossary, and APMP conference presentations. The

NCA Chapter will follow suit later this summer as part of our efforts to increase the value of APMP membership. You will need to log in using your member ID and password to access these pages.

Be sure to put June 9 – 12, 2009 on your calendar for next year's 20th Annual APMP International Conference & Exhibits – Knowledge is Power – at the Sheraton Wild Horse Pass Spa & Resort in Chandler, Arizona. The Call for Presentations will be coming soon to an e-mail near you! See you there!

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 over 20 years' proposal development experience. Beth is Senior Proposal Manager/ Marketing Communications Manager for Lohfeld Consulting Group, Inc. Contact Beth at beth@apmpnca.org.

Dennis Fitzgerald and Paul Kay of 24 Hour Company shared their insights with visitors to their booth.

APMP Corporate Partners and Members exhibited their services to attendees. Attendees also enjoyed access to the APMP Bookstore where they could browse through books suggested by the conference speakers for their valuable hints and tips.

APMP selected the NCA Chapter's own Mike Parkinson as one of its 2008 Class of Fellows for his contributions to the proposal and business development industry.

Mallard ducks were a familiar site throughout the facility— whether in the many ponds, begging for treats in the outdoor bars and restaurants, or strolling down the hotel corridors.

Many conference attendees took time out to enjoy the resort's famous golf facilities.

Writers' Roundup: Cohesiveness—A Writer's Glue

Patricia Kent

"You must clearly set up each main topic/concept to ensure the reviewer is ready to receive what is to follow."

Another RFP was just dropped on your desk. By instinct, you put on your proposal manager hat and begin the routine functions that—theoretically— keep you on track from the day of the RFP's release to the day of proposal delivery. But, they are also just the beginning of the myriad of proposal development activities the proposal manager knows all too well. And; of course, the ultimate goal is to produce not only a compliant proposal, but also one that—to put it bluntly—reads well! All of the words of the subject matter experts fitted into the prescribed RFP format instructions cannot convince reviewers to select your proposal if they cannot easily comprehend the intended message.

As the storyboards florish with theme statements, discriminators, and response data, the section drafts begin to unfold, and online file folders multiply as writer collaboration intensifies. Soon the inevitable approaches—the content read. It is the hour of truth! You formatted the document according to the RFP instructions, and you checked the sections for key words that seem to indicate a compliant response to the requirements. But, oh my, a major issue stares at you so boldly it cannot be overlooked. As you read through this wealth of information, you find there is no clarity of thought or cohesiveness. The words are there, but they lack the organizational focus, the all-important flow for ease of comprehension. So what is the answer? You go back to the writers and have them follow some very simple, cohesive writing tips.

One: Go back to your storyboards to make sure the writing follows the outline. Does your outline match your narration? If not, where are the missteps? Is the outline complete? Is there content in the narration that does not show up in the outline and vice versa? Based on answers to these questions, make the necessary adjustments for content.

Two: Now you should have all of the main points and supporting details needed to revise the writing. The next step is to apply organizational cohesiveness—that glue that will tie your sentences and paragraphs together to produce a comprehensible flow. Try using these steps to achieve that goal:

- Organize your main topics/ideas logically. Follow your outline and establish a sensible flow of information so the reviewer can easily grasp the meaning of even the most complex narration.

- Introduce each new topic like you are playing volley ball. That said, I had a high school coach who constantly yelled at me for not setting the ball up first before sending it over the net. I'd get excited and give it one clean swat, which meant it never went in the intended direction. The same goes for writing; you must clearly set up each main topic/concept to ensure the reviewer is ready to receive what is to follow.

> **" Follow your outline and establish a sensible flow of information so the reviewer can easily grasp the meaning of even the most complex narration."**

- Use the same concept for each paragraph and for each sentence in those paragraphs. Arrange them logically. The flow needs to be consistent on all levels. Link the ideas with the appropriate transitional words or phrases. Do you want to present your ideas in chronological order, by steps in a process, or maybe by cause and effect? The choice is yours. Choose the words that logically create that connection.

- Make the proposal headings derived from the compliance matrix work for you. Use them as the road signs to help the reviewer move from one major point to the next. And, of coure, proposal writers are generally given the latitude of inserting additional subheadings for more detailed focus. So think of these headings in terms of interstate signs for overall direction, while the smaller signs lead to the inviting side roads for closeup and personal interaction.

- Use bullets and easy-to-read tables for lists of several items, especially if they require complex punctuation. This can be especially helpful if it allows the reviewer to check off key requirement items (tools, software, hardware, and so on).

Oh, and by the way, the old three-step adage still works: telling them what you are going to tell them, tell them, then tell them what you told them—but do it logically and cohesively!

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.
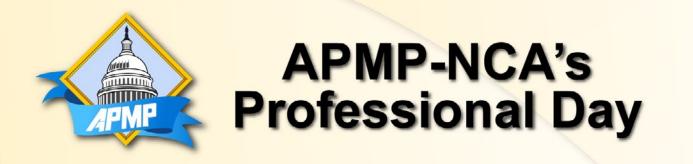
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Boot Camp Sets a New Precedent

Patricia Kent

More than 200 new and existing NCA chapter members registered to attend one of our most popular educational events to date.

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

Whether you were a "new recruit" to the proposal field, or just wanted to improve your proposal skills, Boot Camp 2008 was the answer. More than 200 proposal professionals had the opportunity to learn more about proposal development from the leading proposal management professionals in our region.

The event attracted a new audience to the APMP with a significant number attending an APMP event for the first time. Twelve companies sent more than four attendees with one company, Abt Associates, Inc., registering 20 attendees.

Led by Boot Camp Chairperson, Bob Lohfeld, the planning committee assembled 15 presentations covering topics that chapter members indicated they wanted to learn more about. The committee organized the presentations into three tracks: Proposal Coordination, Proposal Writing, and Proposal Management.

"More than 200 proposal professionals had the opportunity to learn more about proposal development."

The response to the event was overwhelming positive based on attendee response to evaluation forms. Most attendees indicated they learned "a lot of great information," would come back next year, and would recommend the event to others. Highlights from the three tracks follow:

Key Points from the Coordination Track:

The proposal coordinator's role focuses on four major areas:

1) Establishing the proposal infrastructure

2) Coordinating daily proposal development

3) Supporting proposal reviews

4) Performing final document production

–Navid Nemzoff, AOC Key Solutions, Inc.

"Graphics lead to a more profound and accurate understanding of presented material. Graphics grab our attention and may influence how we attend to the rest of a story." **– Mike Parkinson, 24 Hour Company**

Key Points from the Writing Track:

"Proposal writers should understand the big picture, collaborate with others on the team, be a part of win strategy and theme development, organize section content based on RFP, develop persuasive, succinct proposal text, focus on benefits to customer." **– Dennis Berg, Shipley Associates**

"To overcome an inability to tell a story, consider overcoming the need and desire to tell one, as difficult as that may seem." **– James Dunn, Executive Consultant, Red Team Consulting, LLC**

Key Points from the Management Track:

When managing a proposal, *"You better look organized—[prepare] a schedule of events, roster of participants, writer's handbook, key capture strategy elements, version management."* **– J. P. Richard, Advantage Consulting, Inc.**

Contractual documents you need to be aware of when managing a proposal are *"non-disclosure agreements, teaming agreements, and exclusivity."* **– Shlomo Katz, Brown Rudnick Berlack Israels LLP**

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.

Job Listings: Find Your Next Proposal Management Job

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Department: **Staffing**
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General Dynamics Information Technology
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Fairfax, VA 22030
Scott.deslauriers@gdit.com
Date Posted: **03/21/2008**

Job Title: **Proposal Coordinator**
Company: **AOC Key Solutions, Inc.**
Contact: **Kayleigh Marquis**
AOC Key Solutions, Inc.
14030 Thunderbolt Pl.
Suite 700
Chantilly, VA 20151
kmarquis@aockeysolutions.com
Date Posted: **04/01/2008**

Job Title: **Proposal Manager**
Company: **LMI Government Consulting**
Contact: **K. White**
LMI Government Consulting
2000 Corporate Ridge
McLean, VA 22102
kwhite@lmi.org
Date Posted: **04/15/2008**

Job Title: **Proposal Professionals**
Company: **Whiteford & Associates, Inc.**
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Whiteford & Associates, Inc.
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Payment must be received via check made payable to "APMP-NCA" at APMP-NCA, P.O. Box 3063, McLean, VA 22103-3063 or via PayPal (contact Lou Robinson to have a PayPal link set up for you) by the advertisement submission deadline for the advertisement to appear in that corresponding issue. Late submissions will appear in the following issue of the *Executive Summary*. APMP-NCA reserves the right to reject advertisements for non-proposal or non-business development-related products/services or for content it deems objectionable.