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Executive Summary

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President's Corner

CROCODILE WINGATE RESPONDS TO FAST-TURNAROUND PROPOSALS

Beth Wingate, AM.APMP

f I ever dreamed about becoming a "legend," I never imagined it would be as a proposal manager cranking out winning fast-turnaround proposals. But, in the eyes of the Australian contingent at this year's APMP International Conference in Palm Springs, apparently those of us who do so are true legends. Hmm...Crocodile Wingate?

Nigel Denis from Australia's The Proposal Company had all of us drooling and daydreaming at the conference 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 for ensuring that proposals don't interfere with leisure time! Afterwards, Nigel was amazed when listening to a group of us late 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 (along with preparing our "regular" 15- to 30-day proposals). (Don't dwell on the fact that we were by a stunning pool and avidly discussing proposals!) Nigel promised we'd become legends in Australia once he returned home and shared our tips and hints!

Many of us working in the Federal Government arena know this fast-turnaround situation as a fact of life—especially in the period leading up to the end of the government fiscal year. Those of

us who want to retain some semblance of sanity and work/life balance have developed a number of mechanisms and processes that enable us to produce and win these proposals without completely burning out our teams and ourselves—and without giving up our weekends.

At the NCA Chapter's June 6 Proposal Basics Boot Camp, I presented the "Creating a Winning Task Order Proposal Process" session in which I shared best practices I've learned and developed for building and managing a winning task order proposal process over the past 21 years. (Task order proposals are simply responses to solicitations under contract vehicles your company already holds, aka "hunting licenses." These fast-response techniques apply equally to non-task order proposals.) In my presentation, I compared a fast-turnaround proposal shop to a well-oiled factory performing at peak capacity.

"Typical" Factory (Your Proposal Shop) Orders (Customers' Solicitations)

Let's set the scenario. Your proposal factory's incoming orders range from:

- A pricing worksheet with 2 100+ resumes delivered via email and/or hardcopy.
- A full-blown, multi-volume proposal with car-loads of copies—and no two proposals

"It's unrealistic to expect to produce a winning proposal in a vacuum." under that contract vehicle have the same set of contents, for example, a management plan—sometimes, staffing plan—sometimes, quality assurance plan—sometimes...

- An electronic submission of 5 30 pages in a standard format of past performance and technical approach with or without resumes and/or past performance questionnaires.
- Something completely different and unexpected.

So now that fast-turnaround solicitations are clogging your email system, how do you set yourself up to win?

Nine Key Factors to Win

I maintain that there are nine key factors you need to produce winning fast-turnaround proposals. Your mileage may vary—but these are the absolute basics for success.

1. Client Knowledge—Comprehensive and "Real"

You need business development folks walking the clients' hallways, meeting with clients, and learning about their existing environments, desired solutions, hot buttons, available budgets, and schedules for upcoming solicitation releases.

You need a realistic pipeline of upcoming opportunities that you, the proposal manager, see constantly. I suggest weekly "quickie" meetings with individual business development/business unit managers. Schedule a regular time each week to get together for 10-20 minutes. Having these meetings and gathering this information drives a lot of the capture and proposal development process down the line such as competitive analysis, resume and past performance preparation, draft solution preparation, draft graphics development, and pricing.

You'll quickly see the value of these meetings—they can also help you alert management when you think your proposal group will need additional assistance or when you think a particular business group is stretching itself too thin to win anything they bid.

2. Knowledge about Your Competitors

It's unrealistic to expect to produce a winning proposal in a vacuum. Knowing about the other

potential bidders and their pricing strategies, past history, existing staff and subject matter experts, experience with a client—and what your mitigation plan is for each—is vital.

3. Proposed Solution

You need to be able to articulate—and draw—your proposed solution. Ideally, it should be complete and low-risk, demonstrate understanding of the client's environment and needs, contain demonstrated experience and results in similar environments, and provide added-value offerings.

4. Task Order "Factory"

You need a responsive, well-oiled proposal factory co-located with business development/operations. The proposal factory needs to be capable of providing complete proposal development services—"soup to nuts"—including boilerplate content (resumes, past performances, bare-bones management plans, subcontracting plans, standard graphics, etc.).

"You need a responsive, well-oiled proposal factory co-located with business development/ operations."

Your proposal factory should be intimately familiar with the proposals you've submitted previously so you can suggest pertinent content and avoid "reinventing the wheel." You should be intimately involved with your business

development group so you know who's going after particular deals—and so you have visibility into a realistic pipeline and can staff proposals adequately. It won't be long until you're seen as a valuable "institutional knowledge" resource to your internal clients.

5. Easily Searchable Past Performances Repository—the 3 "Cs"

You need a past performance repository that is easily searchable and full of relevant, current, similarly sized and scoped past performances that contain demonstrated results—include metrics and examples, awards, and quotes from clients.

"After 21 years, I maintain that you need complete, formatted resumes on all your current employees—at minimum for the folks that you "always" bid."

Your repository can range from a simple set of subdirectories organized by client agency that you search using a commercially available search engine (my favorite product is dtSearch, www. dtSearch.com), to a full-blown database to a set of documents residing on a SharePoint or Privia collaborative site to one of the many commercially available proposal development products. The key is having access to comprehensive current content (my proposal 3 "Cs").

6. Easily Searchable Resumes Repository

I've gone back and forth with folks on the value of maintaining up-to-date employee resumes for use in proposals. After 21 years, I maintain that you need complete, formatted resumes on all your current employees—at minimum for the folks that you "always" bid. We know there's a core group we depend on time after time. Keep their resumes up-to-date and ready to go, and you'll have time to update the resumes of the other folks you decide to include in a particular proposal. (You'll have time because you've got a solid working relationship with your business development and operations folks and know what opportunities are coming up and who in your business unit intends to bid on them.)

Follow resume best practices and make sure you slant your resume section towards the prime contractor versus subcontractors, include all required skills/years of experience/certifications/education, have the staff available on day one, and set up your resume template for easy evaluation. (Be sure to tailor as necessary for a particular solicitation.)

7. Easily Searchable Graphics Repository

Maintain a set of general company processes/ procedures graphics to use as a basis for quickly tailoring to a particular opportunity. I had great success developing such graphics in MS Visio—my technical writers could "tweak" the graphics easily, and my proposal managers and I could render the final graphics quickly. This is essential for getting quality proposals out the door quickly.

Just like Graphic Guru Mike Parkinson has taught us, graphics need to be reader friendly and clarify messages. To conceptualize graphics effectively, you need to be sure you and your writers understand the graphics' PAQs—Primary Objective, Audience, Questions to be Answered,

and Subject Matter. Graphics need to clarify and simplify topics and reinforce the proposal text.

8. Pricing

Within ethically acceptable practices, you need to know as much as possible about pricing your proposal. What is the client's available budget? What do your expected competitors typically bid? A comment from a contracting officer during a debrief has stuck in my mind for years, "Sharpened pencils, honey, sharpened pencils!" Again, the pipeline meetings in item 1 above are ideal opportunities for getting the pricing efforts "moving along" versus waiting until the afternoon before the proposal is due.

9. Cooperative Management

I can argue that cooperative management is the most important of all my nine "keys to winning." You have to brief management on your fast-turnaround response process, and management needs to support your process and schedule completely

You have to brief management on your fast-turnaround response process, and management needs to support your process and schedule completely if they want to win.

if they want to win. Management needs to supply the equipment (high-speed reproduction equipment, fast and stable computers preferably laptops that you can carry to meetings and take notes (one of my personal best practices to keep everyone on the same page is

taking copious meeting notes that I distribute to my teams). You need a stable network with plenty of storage and a reliable mechanism for accessing files from outside the office. (Work/life balance means that sometimes I continue working on a proposal after I've done my Mommy job and then put my daughter to bed.) You'll also want the latest stable versions of whatever software you

"Work/life balance means that sometimes I continue working on a proposal after I've done my Mommy job and then put my daughter to bed."

use for your proposals and technical support immediately upon request—especially when you're on a proposal deadline. (Face it—if it's one second late to the client, you might as well have never started the proposal.) Be sure to make friends with your technical support folks! Plain and simple, management needs to be an enabler—not an obstruction.

Conclusion

Obviously, it takes time to build your fast-turnaround proposal factory—these are the nine key building blocks you need to construct that factory. Check out the articles in this edition of the Executive Summary and see how others in our profession are tackling fast-turnaround proposal challenges every day. And please email your comments/questions on the topic to me. I'd love to hear how your factories are performing and share your hints for winning—while remaining sane and maintaining work/life balance—with our Chapter.

"Hats off" to Nigel for his quest to maintain

the Aussie lifestyle in the face of his proposal workload. To paraphrase one of my favorite Jimmy Buffet's songs, "I ate the last mango in Paris...and, Jimmy, there's still so much to be done." Get out there now and become a "legend."

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



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ASK THE GRAPHICS GURU

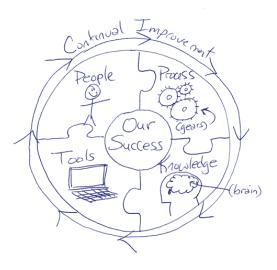
Mike Parkinson

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

"I have very little time for graphics. What can I do?"

I recently surveyed business and design professionals about their biggest graphic challenges. The number one answer to my survey was...time. Either we lack time to make graphics, or we spend too much time on tweaks, changes, and false starts. So to help my fellow overworked professionals, I have compiled four tried and true best practices to streamline the graphic process and save your most valuable commodity—time.

1. Evolve the concept before rendering the final graphic. Rendering a graphic on a computer is too time-consuming. Instead, make a rough sketch of your concept first. You do not need to be Michelangelo to communicate your ideas with a basic picture. Boxes, circles, stick figures, lines, arrows, and labels sufficiently communicate anything. Look at how much is communicated by this simple pen drawing.



Get a colleague to review your sketch. Ask them to explain it to you. Did they understand what you wanted your graphic to communicate? If not, make edits and ask again. Repeat this process until your reviewers agree that your graphic communicates the intended message. It is much easier (and takes far less time) to erase a few lines or scratch out a box or do a total redesign of a rough sketch than create a final computer rendering for each change.

2. Leverage existing graphics. Create a library of graphics commonly used in your company's presentations, proposals, and marketing materials. These graphics are your foundation for new projects. It's much easier to start with an older, successful graphic and tailor it, than start with a blank piece of paper. If nothing else, your library of graphics will get you thinking graphically. You will be amazed how fast ideas come when you flood your brain with visuals.

Here are three online options to help:

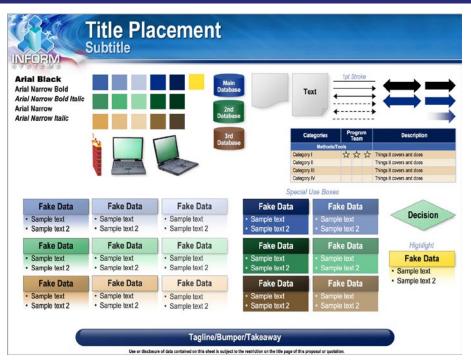
- a. View a library of business graphics at http://www.billiondollargraphics.com/businessgraphiclibrary.html.
- b. Check out BizGraphics On Demand at http://www.billiondollargraphics.com/BGnow.
- c. Also, search Google Images at http://images. google.com to see how others show similar information.

3. Make your graphics customer focused.

Most graphics are trashed because they fail to connect with the audience. Give your future customers a reason to care. When looking at your graphic ask, "So what?" If your graphic can answer that question, you are on the right track. Highlight any features, benefits, and discriminators that will appeal to your audience. If you don't know what they care about, you want to find out. Go to their website, ask someone who knows them, do your homework. Not knowing what your audience cares about means wasted time and certain failure.

4. Use a template. Reduce the need for last-minute formatting passes by creating a template. Agree to and use a template that defines all variables of the graphics and layout at the beginning of the project: line style, font size, colors, etc.

Stop losing time and working too hard. Apply these four best practices to your next graphic project and be more successful with less work! "In the end, you can have two or more companies with the same solution, benefits, and differentiators, but the company that clearly communicates its solution will win."



I need help getting unique messages out that differentiate us from the competition.

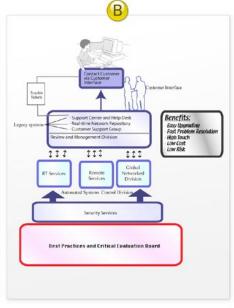
This is a challenge I hear often. Many of my clients have said, "We pretty much have the same solution as our competition." That may or may not be true. (There is usually at least one key discriminator between you and your competition.) The good news is that there is a solution: communicate better and you win.

Assume two companies did their due diligence with sales and research. Both companies offer the same solutions at a fair price. The winner will be the company that best communicates its features, benefits, and discriminators. The company that

stays "in the weeds," ignores the customer's needs, or buries the solution in a sea of text will fail. In the end, you can have two or more companies with the same solution, benefits, and differentiators, but the company that clearly communicates its solution will win.

I highly recommend using visuals to set you apart from your competition. They communicate mountains of information about your solution and your company in seconds (up to 60,000 times faster than text alone). The quality of your graphics quickly shows your professionalism, and your commitment to winning the proposal, and gives your future client insight into the resources at your disposal. For example, which company is better—Company A or Company B?





"Surprisingly, many designers are not good conceptualizers."

What most of us fail to remember is that evaluators do not want to sift through a mountain of data to learn if you have the right solution for them. They may ask for a detailed proposal, but it does not mean they want to read all of it to make their decision. EVERY evaluator and decision maker I interview says the same thing, "Make it easy for me to understand your solution, please."

You have very little time to communicate why your future client should care. Quickly give them an overview of your solution and show them how they will benefit. Most proposals bury the solution in wordy descriptions, mountains of text, and horribly complex graphics that mean almost nothing to your future client.

Don't get me wrong, writing is very important. However, I'm sure you will agree that sometimes the best-written proposal loses. Evaluators and decision makers have fractured attention spans just like you and me. That's where graphics really help.

But you have great graphics in your proposal, right? Unlikely. Most proposal graphics are confusing, complex, poorly rendered, and fail to

"Most proposal graphics are confusing, from people complex, poorly rendered, and fail to convey anything of value to the future customer."

convey anything of value to the future customer. The issue stems with NO conceptualization or visual communication training turning their solutions into graphics. Oftentimes, authors are asked to conceptualize

graphics. Without training, this can lead to a graphic that is too complex or doesn't properly convey the solution. Other times, designers are charged with the task of developing graphics for your proposal. Surprisingly, many designers are not good conceptualizers. It is a misconception that all graphic designers are good visual communicators. Many are good renderers (they can use the tools available to make attractive graphics—which is extremely valuable), and some are good conceptualizers. All of us have our strengths and weaknesses. The same is true for every profession. Writers, engineers, accountants, lawyers,

scientists, doctors, and business professionals of all types have specializations. You have your strengths and weaknesses. Designers are the same. Confirm that your designer or author is capable of conceptualizing and they understand the process fully before asking them to render graphics that could help win a proposal.

In the end, most sales presentations and proposals ignore visual communication or ask an untrained author or graphic designer (who specializes in rendering) to conceptualize. That's like asking a plastic surgeon to do brain surgery.

Remember, the secret is to know your future clients. Focus on what they care about most. Are they risk averse? Focus on past performance, testimonials, and metrics that prove your experience and success. Even better, tell a story where your solution has helped others with similar needs, saved lives, reduced cost, etc. (There is a saying I heard from Andy Bounds, author of The Jelly Effect, "Facts tell but stories sell." I know it to be true.)

To differentiate yourself from your competition, it will come down to a few strategies working together. Offer the client a good solution at a fair price. Research your client so you can tailor your proposal to meet its specific needs and cite examples of similar successful solutions developed for other clients. And, most importantly, use visuals to communicate your solution quickly and clearly, highlighting discriminators that may or may not be shared by others. Remember, if the evaluator or decision maker sees and understands your discriminators but not your competitor's, then you have the winning advantage.

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

MEMBERSHIP CORNER: How Are WE MEASURING UP?

Chris Simmons, NCA Membership Committee Chairman

e are well into the third quarter and, it's a good time to see how the Membership Committee is measuring up so far to the goals we set in January.

The overall goal of the membership committee is to facilitate the achievement of significant membership growth, including increasing new memberships and increasing the retention rates of existing members. We dedicated 2008 as the year to aggressively pursue the APMP Best Membership Award (for the local area Chapter that shows performance in growing membership). The following APMP membership award evaluation criteria provide a barometer for our membership progress and self-assessment (scores) to date.

Membership Innovations. We implemented a number of membership innovations this year that

NCA Membership Profile (as of October 1, 2008)

- 229 new members since January 1st
- 810 total members (666 affiliated, 144 non-affiliated)
- Net growth of affiliated members (19.6%)

are designed to attract new members and retain existing members. These innovations included: 1-Proposal Boot Camp; 2- Membership/affiliation cards; 3- A membership table at major chapter events with national and local chapter literature, and; 4- A regular new *Executive Summary* member feature profiling reasons for joining APMP, job responsibilities, and biggest Business Development issues and challenges. *Score: B*+



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

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

Self-update your email address directly on the NCA Member and Colleague Database page on NCA's Web site at www.apmpnca.org/ redesign/members/ login.cfm Marketing Materials. We developed flyers for membership/affiliation (distributed at the national convention in Rancho Mirage), and for membership committee participation (distributed at selected Roundtables). We also developed specialized email messages targeting new members, non-affiliated members, expiring members, and prospective members. In some cases, we followed up with personalized calls to solicit feedback on selected events or correspondence. This *Executive Summary* Membership Corner article has become a standard feature in every issue and an important channel for getting the membership message out. *Score: B+*

Number of Paid and New Members. Our chapter continues to demonstrate a leadership position with 779 paying members. The second closest chapter in the US is Southern California with approximately 150 members. Outside the US, the UK is catching up with approximately 400 members. So far this year, 229 new members have joined our chapter. *Score: A*

Increased Annual Membership. Despite a significant number of new members this year, many members move out of the region, fail to

renew, or change jobs and lose contact. The overall net increase in APMP-NCA membership compared to last year is 18.53 percent. The reasons why members leave and an increasing membership retention are major focus areas and future initiatives. *Score: C-*

Membership Committee Participation. The service level and time demands on the professionals in our field make it challenging to attract volunteer committee members. Although we have expanded the committee to seven members, participation levels are inconsistent. We are actively recruiting additional membership committee members and are planning to form specific subcommittees to support upcoming initiatives. *Score: B-*

Thank you for your continued interest and participation in APMP and local NCA Chapter events. If you have any questions about affiliation and local Chapter event or committee participation, please contact Chris Simmons at chris@apmpnca.org or 202.255.2355.

NCA Member Profile

Name:

Sara Kindsfater-Yerkes, Co-Founder; Vice-President

Company:

TeamCatapult (www.teamcatapult.com)

How did you originally hear about APMP?

Through one of the APMP-NCA Board Members who provides consulting services to our company.

What made you decide to join?

To develop in-house expertise on proposal development and management.

What is your current BD role/responsibility?

To develop new business in key verticals and strategic client bases.

What is your biggest BD challenge/issue?

Being equipped to respond to proposals with short turn-around times.

What do you hope to get out of membership and NCA affiliation?

Networking, learning, and building a cadre of PM professionals who can help develop great proposals.

Fun Fact: I love motorcycling and anything Harley-Davidson!



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Well-versed in interpreting proposal solicitations and other contractual documents, drafting teaming and non-disclosure agreements, mitigating organizational conflicts of interest and protecting intellectual property rights as part of the proposal process, Brown Rudnick is proud to be a Corporate Partner of the NCA Chapter of the APMP.

TEN TIPS FOR WINNING FAST TURNAROUND PROPOSALS

Olessia Smotrova-Taylor

"Most companies,

competition, will be

doing less and doing

cut down marketing,

spending on capture, and they will not

make the investments

into building a better

proposal capability."

with less: they will

including your

they'll reduce

ou don't need a crystal ball to see that a shaky economy is sure to lead to further budget tightening—not only for households, but also for government agencies. I am not an economist, and I'm not one for popular gloom-and-doom predictions, but I can safely guess that competition in proposals may tighten even further with fewer opportunities to bid on. Even if this is a short-term crisis, the evolution of acquisition laws with an ever-increasing demand for competition is continuing. For example, this September, the Congress passed the fiscal 2009 National Defense Authorization Act that mandates changes to contracting regulations, including more competition for task and delivery orders.

In these difficult times, business owners and business developers have only two courses of action available to them:

- 1. Tighten your belts, bid on fewer proposals, cut costs, make even greater use of your overworked in-house resources, and hope to win on price based on lower rates. Hunker down and hope that your company survives until good times come around again, hopefully by 2010-2011.
- 2. Increase your proposal development capabilities, bid on multiple award contracts, and look for hidden opportunities in your existing IDIQ and GWAC vehicles by sharpening and refining your approach to winning task orders.

Most companies, including your competition, will be doing less and doing with less: they will cut down marketing, they'll reduce spending on capture, and they will not make the investments into building a better proposal capability.

For you, now is the time to take action. More importantly, now is when you should allocate some time and money to implement smart measures to help you sail through the hard times

and prepare for the new competitive environments. Kevin Plexico, senior vice president of operations at INPUT, recently said that with no major single contract awards coming in 2009, contractors should position themselves to go after recompeted awards and task orders and multiple award vehicles, the latter of which now account for about 30 percent of government contracting.

To get you ready, here are my 10 tips for getting your short turn-around proposal win rate way up:

1. Train and equip your operations personnel to become your sales force. Let's face it—the majority of the project personnel do not know

It is nearly impossible to put a winning proposal together in under 30 days, unless you are an incumbent or when it's your core business.

much about capture and proposals. They require training specifically geared to technical personnel to get them to assist business developers. Then, they can help you identify, target, and secure opportunities with existing and new customers.

11

As you know, in fast turnaround proposals, advance notice is king. It is nearly impossible to put a winning proposal together in under 30 days, unless you are an incumbent or when it's your core business. If you keep reacting to seemingly sudden task order requirements, training your project people will change this disturbing trend. Your operations staff will alert you ahead of time so you have sufficient time to prepare. They have a trusting relationship with the customer

"To avoid spending extra time on formatting, I like having a proposal template with a custom toolbar built by using MS Word macros."

because they are not pegged as the slick business developers. They will also find out what keeps the customer up at night and what hidden requirements need answering. The key to success is not only the training, but also the establishment of formal communication mechanisms between the operations personnel and business developers, and the integration of your operations personnel into your capture and proposal process.

- 2. Build a "file" on your IDIQ customer or a GWAC set of customers. What I have found particularly helpful is to have a table that lists all key decision-makers; their profile; whether they are a friend, enemy, or neutral; and their top three pet peeves and hot buttons. This table is linked into the customer contact log. I also create a "customer map" that places the organization chart in the entire acquisition cycle, including Congressional appropriations and the end users, with the points at which you can shape acquisition. Collecting and distilling all materials and articles about this particular customer into a succinct document is important. This document should also include salient points from their presentations and interviews.
- **3. Develop a capture and marketing collateral library.** This library should include white papers developed by your technical gurus that relate to the specific areas this IDIQ or GWAC covers. Also, consider including studies you may want to reference such as Gartner Reports, case studies, brochures, and other information your business development or program staff can hand to the customer for them to get to know you better and to build trust.
- 4. Keep a detailed task order win/loss tally. Another key detail is to keep a tally of what you are winning, what you are losing, and how well your competitors are doing in each area. You can glean all kinds of information from this tally for example, what past performance your competitors may tout, and what are the important customer spending trends. This tally should be linked with the competitor profile you develop and your col-
- **5. Create a task order manual.** The task order manual is a living document that covers a myriad of topics important to the contract vehicle. It contains the historical knowledge about the IDIQ or GWAC, how to interact within the team, what

lection of notes from the win and loss debriefs.

are the marketing and customer engagement rules for the team, how you assign task order work, how task orders get evaluated, what presentation approaches win for this particular customer, where to find all the important data for this IDIQ or GWAC, and other vital information.

- 6. Populate a collaborative workspace with a library of relevant documents. You need to build a documentation library. This valuable reference resource should include IDIQ proposals you have won and lost; all previous task order RFPs; a library of your and your teammates' past performance information, with kudos from the customer; a database of resumes for personnel you bid frequently; management, subcontracting, quality, and transition plan templates; common win themes; contact lists for everyone who could be involved, including consultants you could call if you are short on resources; price-to-win information; any golden nuggets such as your company's accomplishments and certifications; and an all-important graphics library.
- 7. Create proposal templates. To avoid spending extra time on formatting, I like having a proposal template with a custom toolbar built by using MS Word macros. This toolbar lets any author apply a professional style to the text and saves time for desktop publishers. Other items you need are a branded cover with a space where you can insert an image and text custom for this bid, a typical transmittal letter, cost proposal template, and any other documentation that is common from proposal to proposal.
- 8. Create an IDIQ-specific task order proposal process and proposal management toolset. I prefer a Visio process flow that shows the capture and proposal process as applicable to the type of task orders you bid on. The process should include subcontracting, cost proposal, human resources, and other functional milestones. I also build checklists for every stage and task, a typical proposal resources plan, a kick-off template, instructions for reviewers, and typical proposal schedules for varying durations—from the shortest to the longest task order proposal.
- 9. Prepare both abbreviated and detailed style guides for the editor. Your editor, especially if they are new, should not have to guess or assume your conventions and rules. I like to have a brief 20-page version of a style guide at their fingertips

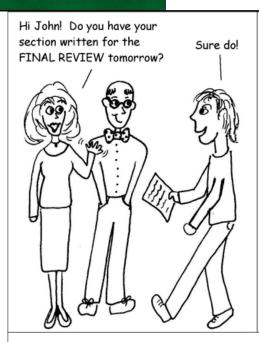
"Every time you finish a proposal, no matter how much you are tempted to catch your breath and forget everything, conduct a brief lessons learned session and document your conclusions."

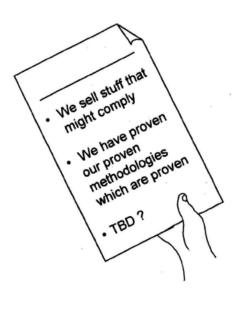
that contains all the main rules they need to follow, and a full GPO style guide available electronically at their fingertips while editing.

10. Collect lessons learned to tweak your process and tools. Every time you finish a proposal, no matter how much you are tempted to catch your breath and forget everything, conduct a brief lessons learned session and document your conclusions. This is not an opportunity for finger-pointing, but rather a practical way to find out which information you can turn into templates and reusable boilerplate, what you can do better, what additional resources you may need, and how to better prepare or plan to win future task orders.

If you implement these 10 recommendations, you are bound to be better off than the great majority of the companies in the market. Remember, even during the Great Depression, there were businesses and people that flourished. I sure trust that the future will not get anywhere near that tough, but from what I hear, things may be slower and the competition steeper in 2009. It is up to you to make the right choices and to keep winning and growing, to defy the common attitudes and trends.

Olessia Smotrova-Taylor is president of OST Global Solutions, Inc., a capture and proposal development and training company. She also serves as the Executive Summary newsletter editor. You can find more of her articles, free webinars, tutorials, and her Business Development blog at www.ostglobalsolutions.com. If you have any questions on how to build a better fast-turnaround proposal development capability or need help, do not hesitate to contact her at 240.246.5305 or otaylor@ostglobalsolutions.com.







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How to Create Great Proposal Themes (Part 2): Features and Benefits

Chris Simmons

In Part 1 of this series we explored the definition of a theme and the benefits of theme development in telling a compelling proposal story that scores well with evaluators. Part 2 takes a closer look at the two primary components of winning proposal themes: features and benefits.

he development of proposal features and benefits is a key part of solution development and the critical first step in developing proposal themes. Most proposal teams use established methods and templates including storyboards, module plans, work packages, or some other form of pre-draft deliverable to provide a process and structure for feature and benefit development.

However, despite providing proposal teams with what might appear to be clear feature and benefit definitions, directions, and examples, many writers and subject matter experts ignore them completely or simply don't understand what is required. At best, features are listed as benefits (and vice versa). Or worse, they are so vague and generalized that they fail to achieve the desired result—to provide evaluators with compelling reasons to select your company. What happens next is predictable. Time pressures force the team to start writing before themes are sufficiently developed, and the entire proposal process begins to unravel. Understanding proposal themes and the features and benefits that comprise them is a big step toward efficient and effective proposal development.

FEATURES highlight what's important to YOU

Features are easier for proposal teams to identify because they are all about their product or service. Proposals can go on and on about features with little or no knowledge of the customer. One of the most vivid everyday examples of a feature 'deliverable' is a simple sticker commonly displayed on the driver's side window of a new car. Car

stickers highlight the most important characteristics of the vehicle: equipment (ABS brakes, air bags, traction control, OnStar); specifications (4 cylinders, 2 wheel drive); the EPA city/highway gas mileage; and the price. This simple sticker saves consumers significant time and effort that would otherwise require their reading the owners manual or performing manual inspections/tests to determine how this car compares to other cars. Can you imagine having to drive the car on the highway and in the city making detailed notes and calculations to calculate gas mileage?

The features you develop for your proposal serve the same basic function as the car sticker. Proposal features describe the characteristics of your solution—such as the type of technology/ tools, methodologies, processes, performance levels, number of key personnel, and a host of other management, technical, past performance, and cost characteristics. Whereas features are all about what's important to you (car sticker), benefits are all about highlighting what's important to your customer.

BENEFITS highlight what's important to your CUSTOMER

Most proposal teams forget that although features are important, what customers really care about are benefits. Benefits are aspects or advantages of the feature that typically solve customer problems or address customer hot buttons. For most proposals, this means increased efficiency, reduced cost, reduced risk, and higher performance levels or some variants of these.

The most effective benefit statements address both explicit (specific evaluation criteria) and implicit customer problems, issues, and concerns (hot buttons). A stereotypical example using the car analogy best illustrates this point.

Most car salesmen are generally good at sizing up their customers as soon as they walk in the

"Despite providing proposal teams with what might appear to be clear feature and benefit definitions, directions, and examples, many writers and subject matter experts ignore them completely or simply don't understand what is required."

"Most of us aren't in the business of selling cars, but the underlying principles of features, benefits, and the relationship between the two are the same in our profession."

door and know which car features align best with customers' benefits to make the sale. A single, well-dressed, high-income, male drives slowly up to the showroom in a bright yellow Corvette. Oh, and the guy has a woman on his arm whom he is clearly trying to impress. The car salesman immediately ponders a short-list of likely customer benefits (power, speed, design/sex appeal) and starts linking features of the sports car he has on the lot (horsepower, 0-60 mph statistics, vibrant colors, and Motor Trend design awards).

Sounds like a done deal, right? Now what if the salesperson knew the woman is a nurse he met in a head trauma unit after totaling his car, and that she has convinced him that safety is a high priority (benefit). You can almost picture the salesman's head begin to swirl as suddenly a new set of features (low roll-over rates, driver steering control, airbags, and impact statistics) are required to address safety benefits that may be quite different from the "need for speed."

Themes link benefits with features to communicate solutions

Most of us aren't in the business of selling cars, but the underlying principles of features, benefits, and the relationship between the two are the same in our profession. The proposal theme provides the connection between what's important to a customer (benefit) and what's important to you (feature). The challenge of the proposal team is to devise an effective and efficient way to identify customer benefits (explicit and implicit) and link these benefits to quantifiable features that best communicate compliant and compelling solutions to customers.

Part 3 of this series will describe how to enhance features and benefits to create more compelling proposal themes.

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.



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LEGAL CORNER: WHEN IS A DEADLINE NOT A DEADLINE?

Shlomo D. Katz, Counsel

t a recent NCA chapter roundtable, I manned a sponsor table displaying a sign entitled, "Ten Ways to Lose a Procurement." The last item on my sign's list was: "Submit your proposal late." Submitting proposals on time certainly is a good rule to live

"...readers should know that not all proposal submission deadlines are firm or even legally binding."

by, while submitting a major proposal late can be a careerending move. Nevertheless, readers should know that not all proposal submission deadlines are firm or even legally binding.

The following are some Government Accountability Office (GAO) bid protest decisions that explain situations in which missing a proposal or other deadline does not necessarily mean losing the procurement.

 Agencies are required to allow offerors a reasonable amount of time to respond to a solicitation or solicitation amendment. An offeror who is unable to respond in the time allotted may have grounds to file a protest seeking to have the time extended. Be aware, however, that the standard is a strict one; the offeror must show that the time allotted by the agency is unreasonable. One factor that GAO will look at in determining whether the

- response time was unreasonable is whether other offerors were able to respond in the time available. Note also, that such a protest must be filed before the due date for submission of proposals.
- Where a solicitation does not contain a late quotation clause spelling out the consequences of lateness, but instead merely calls out a due date, the agency normally should consider any quotations received prior to the selection decision if no substantial evaluation activity has transpired.
- Information whose purpose is to demonstrate "responsibility" may be submitted any time prior to award, even after the proposal deadline. Note, however, that responsibility-type information also can be required for evaluation purposes in some procurements, in which case the ordinary timeliness rules would apply. For example, contracting officers are supposed to consider an offeror's financial capability to perform before awarding any contract. That is called a responsibility determination. In some procurements, the agency may actually evaluate offerors' financial capability, for instance, when the contract requires a large outlay by the contractor before the Government pays any costs.
- Where a contracting officer established a due date for responsibility-related information that was well in advance of the contract start date and then refused to consider the information because it arrived five minutes after the deadline, GAO held that the contracting officer acted unreasonably.
- Agencies sometimes include a clause in solicitations stating that a late proposal "may be considered if it offers significant cost or technical advantages to the Government." At first glance, the clause appears to be imprecisely worded; the Government will never know whether the proposal offers significant cost or technical advantages if the Government does not "consider" the proposal. What this clause really accomplishes is that it gives the Government the discretion to consider a late proposal and award it. Also, GAO has held, the language means that the Govern-

"What this clause really accomplishes is that it gives the Government the discretion to consider a late proposal and award it."

"There are cases where an agency may consider a timely proposal to be too late." ment is not obligated to include the late proposal in the competitive range and hold discussions for the purpose of helping the late proposal offer significant cost or technical advantages.

 Agencies may waive as a "minor informality" an offeror's failure to submit the correct number of copies of its proposal.

Finally, note an interesting twist: there are cases where an agency may consider a timely proposal to be too late. For example, when an offeror revises its technical approach after discussions to the degree that its Best-and-Final Offer or Final Proposal Revision is essentially a different proposal from the initial proposal, an agency may reasonably decide that the new approach was submitted too late in the process to be considered.

What's the moral? Don't be late. But, if you are late, don't assume all hope is lost; there may be arguments or legal options for getting your proposal considered anyway.

- 1. See, e.g., Evergreen Landscaping, Inc., B-239241, 90-2 CPD ¶ 36.
- Morrison Knudsen Corp., B-247160, 92-1 CBP ¶ 35.
- 3. RMG Industrial Sales, B-281632, 99-1 CPD ¶ 58.
- 4. Acquest Development LLC, B-287439, 2001 CPD ¶ 101.
- 5. Tomko, Inc., 63 Comp. Gen. 218 (1984).
- 6. Genesys Research, Inc., 67 Comp. Gen. 305 (1988).
- 7. RGII Technologies, Inc.--Reconsideration and Protest, B-278352, 98-1 CPD ¶ 130.
- 8. Picker Int'l, Inc., B-249699, 93-1 CPD ¶ 275.

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.

WRITERS ROUNDUP: STYLE SHEETS

Outsmarting the Fast Turnarounds

Pat Kent

s a Proposal Manager, I routinely walk over to a whiteboard in my office with marker in hand. This particular whiteboard has just one purpose—to provide a running list of upcoming and current opportunities. The numerous columns charted on the board track pertinent response details such as the potential customer, type of opportunity, and type of contract. But one column, in particular, contains bright red numbers. These are the response due dates—the ultimate deadlines. And what is even more frightening, some of those deadlines are just a few days away.

My job is to manage the responses for these opportunities effectively, regardless of short time-frames. I methodically set and attend meetings, develop the required proposal documentation, and coordinate the tasks of each member of the response team. But to expedite the process when

the deadline is racing closer and closer, I also employ a helpful "ace-in-the-hole"—my style sheets. One is generic; it's simple and can be used for any response. I designed others to meet the response criteria of specific contract vehicles. The goal of each is to advance the writing and editing processes, while still ensuring a quality product. After all, I cannot afford to allow accelerated schedules to destroy the integrity of the response.

The generic style sheet is an abbreviated style guide. It gives the writers and editing staff document development help in two forms: structure and textual content.

Structure – This part of the style sheet
provides the formatting characteristics such
as font face and size, criteria for tables and
graphics, line spacing, and a color palette.
Of course, I can modify this section each
time based on the bid request instructions.

"...to expedite the process when the deadline is racing closer and closer, I also employ a helpful "ace-in-the-hole"—my style sheets."

• Textual content – For this, the sheet lists words/terms specific to the customer's bid request, together with a word choice list to 1) eliminate wordy phrases, 2) make correct grammar choices, 3) select the correct word for the intended meaning, and 4) avoid words and phrases that increase contract risk.

The other style sheets correspond to the template criteria for task order responses. Generally, contract vehicles submit bid requests that follow a basic structure. In those instances, I have found that templates or shells can be designed to jump start the response format. Designed with flexibility, the template includes pre-established title pages,

headers, footers, response page structure with headings, fonts, and graphic requirements.

For me, these style sheets are an essential tool for document development, but too often they are either ignored or just not provided. My suggestion is that every proposal manager include a generic style sheet that can be easily completed at the same time the compliance matrix is structured. Add it to every proposal response package. Make it a mandatory part of the proposal development process. Soon your proposal teams will expect this tool and find it to be a valuable resource.

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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Note From the Editor:

Please take a few minutes and let me know:

What keeps you up at night as a proposal professional?

What articles and tips would you like to see in this *Executive* Summary?

Our Executive
Summary team will
be happy to get your
feedback. I can be
reached at Olessia@
apmpnca.org or at
240.246.5305.

Olessia Smotrova-Taylor Executive Summary Newsletter Chair and Editor

RECORD ATTENDANCE AT THE SEPTEMBER 17, 2008 COACHING NONPROFESSIONAL WRITERS TO GET TO BLUE ROUNDTABLE!

The Roundtable Committee

he September 17 Roundtable Event,
Coaching Nonprofessional Writers
to Get to Blue, was an enormous
success—with record-setting attendance topping
more than 200 people! The presentations, covering techniques to coach nonprofessional writers to
write excellent proposal text, received rave reviews
from the record-setting crowd.

Pitfalls for proposal managers...

- Emailing someone a PowerPoint slide deck is NOT training
- New proposal writers DO NOT understand 'compliance'
- 3. Writing a proposal does not start with writing... it starts with graphics and win themes
 - Baselines should be done in PowerPoint, not Word

getting to blue...

The lively roundtable was chaired and moderated by roundtable Committee member Hélène J. Courard, whose entertaining introduction set the mood for this high-energy, lively discussion.

Drawing from their extensive experience, the panelists—Olessia Smotrova-Taylor, President of OST Global Solutions, Inc.; Lynn Ann Casey, Founder and CEO of Arc Aspicio; and John Lauderdale, President of Proposal Leadership,

An Illustrative Example

JIT Training – at the Kickoff meeting

RFP Analysis

Proposal Writing

Evaluation Team Activities

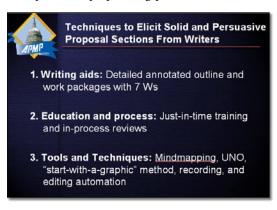
Show respect for their SME contributions

Limit their time requirements by focusing efforts on activities they understand and embrace

Pair specific SMEs with specific writers to achieve max results

Inc., presented concrete tips on how to elicit solid, effective proposal text from nonprofessional writers and shared their thoughts on pitfalls to avoid.

There was no shortage of discussion during the Q&A session following the presentations, which helped highlight some more nuanced topics on the subject. All in all, the event was a smash hit! You can get copies of the roundtable presentations at http://www.apmpnca.org/presentations.html.



The Roundtable Committee would like to thank all who were involved in making this event a success. We look forward to seeing you at the next Roundtable Event November 19, when Briana Coleman will moderate a panel of contracting professionals who will shed insight into their world as they discuss "How to Win Over Your Contracting Officer." We hope you plan on coming for this insightful discussion!



How to Win Over Your Contracting Officer

Just when you think you completely understand the Federal Procurement system, something could change that may well jeopardize the success of your next proposal. Smart proposal professionals know that they have to stay on top of how government Contracting Officers do their jobs, and use the Program Office to their best advantage—or risk failure in today's highly competitive government market.

Find out how to use the RIGHT Federal employee for each step in the contract lifecycle for a smoother, stress-free proposal process at:

APMP-NCA's November Roundtable November 19, 2008; 5:30 – 8:30 PM

Fairview Park Marriott, Falls Church, Virginia

Bring your proposal, capture, and sales teams to the November Roundtable and take back new insights that will give your proposals a leg up in the procurement process.

- What typically pleases and annoys most COs—and specific things you can do to improve the relationship
- What factors most influence CO decisions affecting your proposal
- What responsibilities COs have versus the Program Office or other officials throughout the full contract lifecycle

If you do business with HHS, Treasury, GSA, or DoD, you will want to be on hand to ask our procurement executive presenters about how they handle your proposals!

- Janet M. Mattson, CPCM, Contracting Officer, Team Leader CSAP/CSAT, Division of Contracts Management, OPS Substance Abuse & Mental Heals Services Administration (SAMHSA), Department of Health and Human Services (DHHS)
- Wesley (Wes) McKee, Director of Acquisition Management, Office of the Comptroller of the Currency (OCC), U.S. Department of Treasury, Former Contracting Officer with the U.S. Air Force
- Robert Abood, Contracting Officer, Federal Acquisition Services (FAS), General Services Administration (GSA)

While you're there, visit with our Corporate Partner Guest Hosts—Proposal Development Consultants and Privia by SpringCM.

Register now... Space is Limited! www.apmpnca.org/announcements/071608_roundtable

Professional Day 2008

Brenda Crist

rofessional Day 2008 provided attendees with strategies for measuring and improving success in market analysis, business development, capture and proposal management, and pricing. Expanded networking periods and 14 exhibitors also enhanced learning opportunities for attendees. Exhibitors provided wide-ranging solutions in the areas of capture, proposal, pricing, legal, production, and graphics.



Speakers Sal Fazzolari, Wendy Frieman, and Bob Lohfeld with moderator Bob Weissman

Vicki Griesinger, Director of Operations of the Business Development Institute International, kicked off the session by sharing the results from the Institute's fall 2008 nationwide study of proposal management best practices.



More than 275 attendees registered for Professional Day

Kevin Plexico, Senior Vice President of Operations at INPUT, shared tips on how to acquire information about a bid and how to find potential teaming partners that complement your win strategy. He stressed that nothing replaces first-hand information and primary research; and while the Government provides lots of data, it is not so good at telling you what it means.



Speaker Kevin Plexico of INPUT and moderator Olessia Smotrova-Taylor of OST Global Solutions

Sal Fazzolari of iNEXA Group, Bob Lohfeld of Lohfeld Consulting Group, and Wendy Frieman of CSC, provided recommendations on improving the relationship between business developers, capture managers, and proposal managers. One thing we all learned is that the best-informed team wins.

Molly Gimmel, Executive Vice President of Design To Delivery, Inc., provided specific strategies concerning how pricing and proposal managers can work more effectively together on fixed price, time and materials, cost plus fixed fee, and performance-based solicitations.



Amy Barden and APMP-NCA President, Beth Wingate, provide attendees with information about Lohfeld Consulting Group solutions

Bob Weissman, CEO, Clarus & Fidelis Consulting Corporation, had the attendees roaring with laughter during his presentation on Review Teams: The Good, The Bad, and The Ugly. Bob provided his top 10 tips for making review teams more effective and how to deal with unprepared, disorganized, and disruptive reviewers.

Jayme Sokolow attempted to answer the difficult question "Can You Be a Proposal Professional



Professional Day Chairperson Brenda Crist with Committee Members Nasra Sakran, Elisa Goulart, Pat Kent, June Marion, Bob Weissman, and Russ Huffman



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

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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.

and Still Be Happy?" He recommended that we improve our happiness by building stronger relationships at work, creating work environments that promote well-being, and following healthy diet and exercise programs.

You can find copies of all the presentations at http://www.apmpnca.org/presentations.html.

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.

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Mark Your Calendar for 2008 & 2009 APMP-NCA Events

- November 19, 2008—Roundtable, "How to Win Over Your Contracting Officer"
- January 21, 2009—Roundtable
- March 18, 2009—Roundtable
- April 24, 2009—Proposal Basics Bootcamp
- May 20, 2009—Roundtable
- June 9-12, 2009—APMP International Conference
- July 15, 2009—Roundtable
- September 16, 2009—Roundtable
- October, 2009—Professional Day
- November 18, 2009—Roundtable

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.

Employers 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.

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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.

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

Local NCA affiliation

As an added value to our members, **APMP-NCA** has expanded the posting timeframe of our job board listings. Job postings now run on the board for 90 days. The price per posting is \$65. Check out www.apmpnca.org/ find_a_job.html

JOB LISTINGS: FIND YOUR NEXT Proposal Management Job

Proposal Development Center Support

Citizant Company: Sheila Murphy Contact:

5180 Parkstone Drive, Suite 100

Chantilly, VA 20151 smurphy@citizant.com

Date Posted: 07/31/2008

Job Title: Freelance Proposal Writer

Avisar Information Company: Technology

Contact: hr@avisarinc.com

2111 Wilson Boulevard, Suite 700

Arlington, VA 22201 hr@avisarinc.com

Date Posted: 07/31/2008

Job Title: Proposal Manager

Company: **TechTeam Government Solutions**

Department: Proposals **Deb Shalom** Contact:

6430 Rockledge Drive Suite 150

Bethesda, MD 20854 debra.shalom@techteam.com

Date Posted: 08/05/2008

Job Title: Proposal Manager/Writer

Company: **Digital Infusion Inc** Department: Human Resources Contact:

Bill Permision 656 Quince Orchard Rd. Suite 300

Gaithersburg, MD 20878

billp@digitalinfusion.com

Date Posted: 08/17/2008

Job Title: Freelance Government Contract

Proposal Writer Company: **SNC** Companies

Contact: Pamela Mitsoff

1000 Potomac Street, NW Suite 400

Washington, DC 20007 pmitsoff@snctel.com

Date Posted: 08/20/2008

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