Winter 2009
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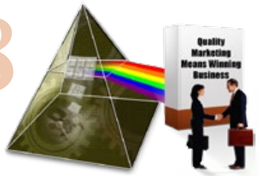

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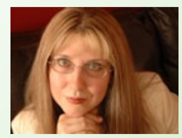

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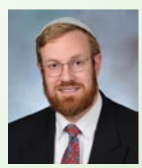


A Publication of the Association of Proposal Management Professionals (APMP) National Capital Area (NCA) Chapter

APMP
National Capital Area Chapter

GOVERNMENT & COMMERCIAL PROPOSALS

PROPOSAL BEST PRACTICES

PROPOSAL INDUSTRY NEWS

PROPOSAL TIPS, TRICKS, & SECRETS

EXECUTIVE Summary

First – and Last – Steps in Any Process

By Beth Wingate, AM.APMP, NCA Chapter President

One of the first things we learn as children and teach as parents is to say **"please"** and **"thank you!"** We frequently hear "what's the magic word?" Answer (depending on the situation) – "please" or "thank you."

One of the first things I did when approached to run for NCA Chapter President was to ask many of my NCA Board of Directors to "please" remain on the following year's board to help me run the largest chapter in the world and to teach me how they ran their committees. I spent my first year as NCA President learning and helping and encouraging our chapter leadership to expand their committees and educational programming. This year, I've worked with the board to refine, fine tune, and codify the way we run our events and committees, and to turn that information into "run books" we can leave that as our legacy to future boards. I'm happy to report that not only have we documented all the "policies and procedures" of each committee and event, but we've also shared this information with many of the APMP chapters around the world to help them learn to run their own educational events.

Along the way, I've tried hard to recognize everyone on the board for their tireless efforts to support our chapter and APMP as a whole – and I've said "thank you" to each of them as often as I can. I'd like to share my "thank you's" to each of them here. As you meet our board members – and our many committee members – at NCA functions, please let them know how much you appreciate their many hundreds of hours of volunteer support to our Chapter. They truly are the backbone of our outstanding NCA Chapter.

Brenda Crist – Vice President and Professional Day Chair. Brenda has been an active member of APMP-NCA since 2003, serving as Professional Day Chair of Publicity (2006), Speakers Program (2007), and Chairperson (2008, 2009) events. Brenda organized our NCA Chapter Strategic Planning meeting this year, ran our successful Grant Program, and has done an outstanding job for our chapter. Brenda has already set the wheels in motion for this coming year's Professional Day – now to be called the "NCA Annual Conference" in recognition of its growth over the years. Brenda is running for the 2010 NCA Chapter President. Thank you, Brenda, for your enthusiasm and amazing hard work on behalf of our chapter!

Jan Cook Butorac – Secretary. Jan has served for 4 years on the NCA Board, patiently and accurately providing minutes of our Board meetings to the Board of Directors, and submits copy to the national organization. Jan is switching gears for 2010 and running for NCA Membership Chairperson. Thank you, Jan!

Eric Schwarz – Treasurer. Eric has been an active member of APMP since September 2007 and joined the Board as a Director at Large in 2008 and Treasurer in 2009. Eric, I appreciate your letting me twist your arm to stay and help keep our finances in order! Eric is running for NCA Treasurer for 2010. Thank you, Eric!

John Bender – Networking Committee Chairperson. John has served on the Board for the past 8 years and currently leads the networking activities at all Chapter functions. He meets and welcomes new members and colleagues, provides them with information about the organization and events, answers questions, and makes introductions to other members and colleagues. John has also graciously provided meeting space and snacks for our Board meetings for years. He is leaving the board in 2010. John, thank you so much for all of your encouragement and support. Our meetings just won't be the same without your warm welcome and cold Diet Cokes!

Robert Lohfeld – Program Committee Chairperson. As NCA's Programs Chair the past 3 years, Bob set up a strong committee to plan and obtain program presentations and speakers for our Roundtables – and presented one of our best-attended Roundtables (on Capture Management). Bob championed the creation of our first Proposal Basics Boot Camp and put together a committee that went on to run a tremendously successful event. They have codified their efforts in a "run book," which is now in use by multiple APMP Chapters. They repeated their stellar performance this year and are already hard at work planning our 2010 event. Bob is retiring from the board at the end of this year. Thank you, Bob, for your many hours of dedicated and motivating support!

Richard Patterson – Chapter's Ombudsman. Rick created the Chapter's Ombudsman position in 2005 and has supported the NCA Board ever since by creating and running our Chapter's Job Board web page. Rick is retiring from the board this year. Thank you so much for all your support over the years, Rick!

Jay L. Schiavo – Marketing and Web Site Committee Chairperson. Jay has served on the NCA Board since 2005 managing the Chapter's Marketing and Web Site efforts – truly an heroic effort requiring innumerable hours of support. He has spent many hours educating us in the art of crafting effective advertising, surveys, and messaging and in communicating the core messages of our education programs. Thank you, Jay, for your creativity and your gracious patience as we've all learned how to better communicate with our members!

Marcia Horting – Corporate Partner Chairperson. Marcia has served on the NCA Board for the past 3 years as the 2008 and 2009 Corporate Partner Chairperson, chair of NCA's 2008 Boot Camp Program Subcommittee, and 2007 Professional Day Exhibitors and Sponsors Subcommittee. Marcia has helped to grow our Corporate Partner program into a strong cadre of businesses that support the Chapter's activities and promote our educational programming. Marcia is retiring from the Board this year, and we will miss her strong leadership. Thank you, Marcia!

Chris Simmons – Membership Committee Chairperson. This is Chris' third year on the board. He has been a regular contributor to the NCA Executive Summary newsletter (now ezine) and a contributing author to the APMP Journal. Chris also presented at the 2008 and 2009 NCA Proposal Basics Boot Camps. As Membership Committee Chair, Chris encourages and promotes membership in the Association and Chapter, coordinates the Chapter membership roster with APMP International, identifies all new members, sends individual welcoming messages to each new member, and coordinates activities to ensure retention of existing members and promotion of new membership. Chris is running for 2010 NCA Chapter Vice President. Thank you, Chris!

Olessia Smotrova-Taylor – Newsletter (now ezine) Chairperson. This is Olessia's second year on the NCA Board, and she and her committee produce our NCA Executive Summary ezine five times each year.

Under her leadership, the newsletter has evolved into a recognized educational tool for our Chapter. Thank you, Olessia! We're all looking forward to the coming year's e-zines!

Bob Miller – Event Logistics Chair. This is Bob's second year on the board, and as Event Logistics Chair, Bob coordinates all meeting arrangements with our hotel including catering and menu selection, room setup, billing, contract negotiations, AV equipment, etc. He and his committee prepare thousands of nametags for our events. He processes thousands of event registrations for our Roundtables, Boot Camp, and Professional Day and then prepares our meeting registration lists. Thank you so much for all of your hours of support and coordination on behalf of our chapter, Bob!

Lou Robinson – Director at Large. Lou has supported the NCA Chapter for 17 years. Lou served as the Chapter's Treasurer for 8 years, Secretary for 6 years, President for 2 years, and Director-at-Large for 2009. He was awarded the National APMP Leadership award in 2003. Thank you for your tremendous dedication to our Chapter, Lou, and for all of the institutional knowledge you've shared with all of us. You've definitely set the bar high for the rest of us!

The End and the Beginning

This is the end of 2009, so **"thank you"** to all of you who participated in Chapter events this year and supported our educational mission. It's also election season for NCA and for the International Boards of Directors. Please take the time to vote in our local election, and thank you to all who voted in the APMP International election in early December.

Results from the APMP International election were publicized on December 9, and I'd like to congratulate NCA Chapter member, Betsy Blakney, on her election as Chief Operating Officer (COO) of APMP International. I've been elected as APMP International's Director of Education. ("Thank you" to everyone who supported me!) In this position, I will take the lessons we've learned and the programs we've initiated in our NCA Chapter to share with APMP at the international level, and I look forward to working with all of you to continue APMP's mission.

As I step down at the end of this year as NCA Chapter President, I'd like to say "thank you" to all of the NCA members who've taken the time to communicate with me over the past 2 years and to share their many suggestions for improving our programming, events, web site, membership procedures, newsletter, email broadcasts, Corporate Partner Program, and every other aspect of running our chapter. I've listened to every suggestion and worked with our committees to implement as many as we could. "Thank you" for being a member of the NCA chapter, and "thank you" for all of your support over the past 2 years. I look forward to seeing all of you at future APMP and NCA events.

It's also the beginning of our planning for NCA's 2010 events, so "please" get involved and enhance your proposal/business development career and network with colleagues at the many opportunities the NCA Chapter provides for you. "Please" consider writing an article for our ezine. "Please" help identify dynamic topics and select speakers for our Roundtables, Professional Day, and Proposal Boot Camp. "Please" work with our Membership Committee to recruit new members and with our Network Committee to greet members at our functions. "Please" share your talents, highlight your abilities, and forge strong relationships with folks who understand your challenges and goals.

There's something for everyone within NCA. "Please" come join us—you never know when the opportunity you seize today will reward you in the future!

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 22 years' proposal development experience. Beth is Managing Director, Proposal Development and Corporate Communications for Lohfeld Consulting Group, Inc. (www.LohfeldConsulting.com). Contact Beth at beth@apmpnca.org or BWingate@LohfeldConsulting.com.

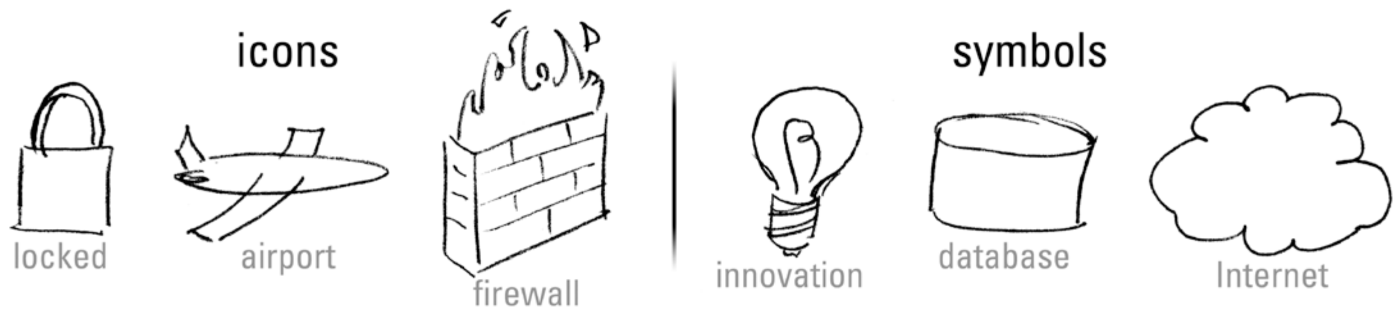
Ask the Graphics Guru

"My benefits and discriminators get lost in my proposal. What can I do to make sure evaluators and decision makers don't miss them?"

Mike Parkinson

Evaluators and decision makers may have fractured attention spans. Your readers want to understand your solution and why they should choose you, and they want to do this quickly. Your goal is to make the job of the evaluators and decision makers as easy as possible. (I'm sure you can see the advantages of making your audience happy, right?) 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 doing something else. In fact, most proposals are not read; they are skimmed and scored.

Here is an easy, effective trick to highlight your benefits and discriminators AND make it easy for your future client to choose you: **use icons and symbols.**



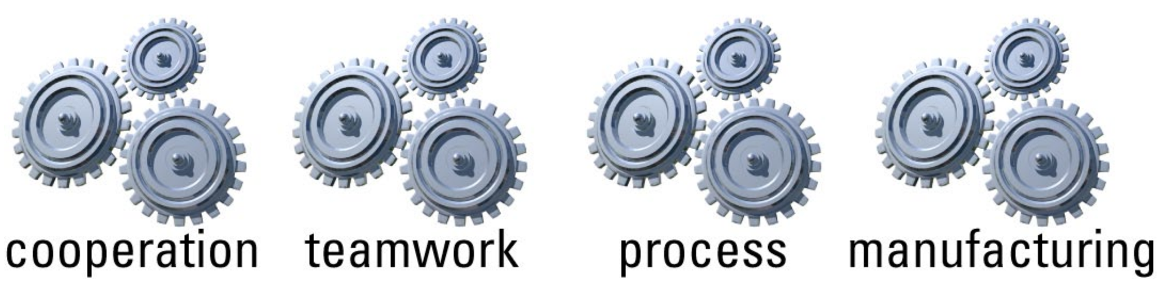
Definitions:

Icon - a representational graphic element, visually analogous with an action, concept, or entity.

Symbol - a representational graphic element with a learned meaning or accepted connotation for an action, concept, or entity.

Icons and symbols break up the monotony of page after page of text.

You can use any image to represent any action, concept, or entity as long as it is logically relevant. Use your insight into your target audience to establish relevancy. (Stylistically, you can make your icons and symbols as high-end or simple as needed for your audience.)



With this in mind, be sure to choose imagery logically relevant to "benefits" and "discriminators" while being congruent with your company, your client, or the subject matter. (For example, use a lock for IT security and a safe for financial security. Whatever you choose, ensure your icons and symbols remain consistent throughout your proposal.)

I **highly** recommend labeling your icons and symbols to avoid confusion (as shown in the symbols to the left). Labeling ensures clarity, and clarity helps ensure success.

If you are page constrained, you could eliminate labeling and simply use legends early in your proposal—in context—to communicate whether your content is a benefit or discriminator.

In the end, it is your decision whether or not to use labels or legends; however, apply your understanding of your future client to determine the right approach. Your goal is to make it as easy as possible for the evaluators and decision makers to give your proposal the winning score.

Mike Parkinson is an internationally recognized visual communications expert and recent APMP Fellow. He is a partner at 24 Hour Company (www.24hrco.com) 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 or call 703.533.7209.

To the right is an example of a discriminator symbol used without a legend.

ODYSSEY software, inc.

Section 10.4: Staffing

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Lower labor cost 23% with Automated Clearance Validation.

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How to Get the Most Out of Government Debriefings

With increased competition in today's marketplace, it's more important than ever to make sure you are cranking out compliant, compelling, and competitive proposals. It makes good sense then to take advantage of the government debrief—a structured process that clues you in on the strengths, weaknesses, and deficiencies of your proposal. Navigating the debrief process can be tricky, however, unless you know the proven best practices used by your most successful competitors.

Find out how to plan for a successful government debriefing, get the specific feedback you need most, and use the results to your best advantage at:

APMP-NCA's January Roundtable

January 20, 2010; 5:30 – 9:00 PM

Fairview Park Marriott, Falls Church, Virginia

Come to the January 20 Roundtable and find out:

- What staff—and how many of them should be at the debrief
- What information you need to go in with
- What you can expect to take away
- What questions you can—and cannot—ask
- How to best leverage what you learn to improve your win rate

Our expert panelists include Lin Pinskey, Contracting Officer, Office of Acquisition Management, U.S. EPA and Gail Young, President, KO Solutions, LLC.

Get five Continuing Education Units (CEUs) toward your APMP Accreditation!

APMP National Capital Area Chapter

Register now... Space is Limited!

www.apmpnca.org

Professional Day 2009 in Pictures

Briana Coleman and Hélène Courard prepare to greet attendees.


Jeff Shen of Red Team Consulting talks with a visitor at his booth.

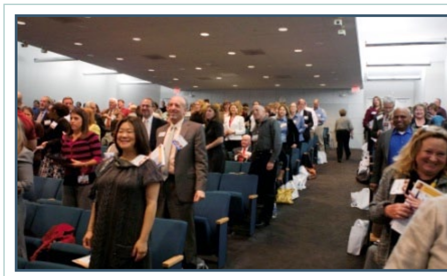
Sylvia Morales of OCI ensures registration runs smoothly.


Thanks to Speaker, Bob Frey who taught us that putting together an understanding and approach was analogous to making a peanut butter and jelly sandwich.


Congratulations to Grantee Mike Parkinson who worked with chapter volunteers to test theories concerning the development of graphics.


Congratulations to 2009 Grantees Earl Wells and Jim Hiles who taught source selection evaluation.

Professional Day presentations are available for viewing by members at www.apmpnca.org.

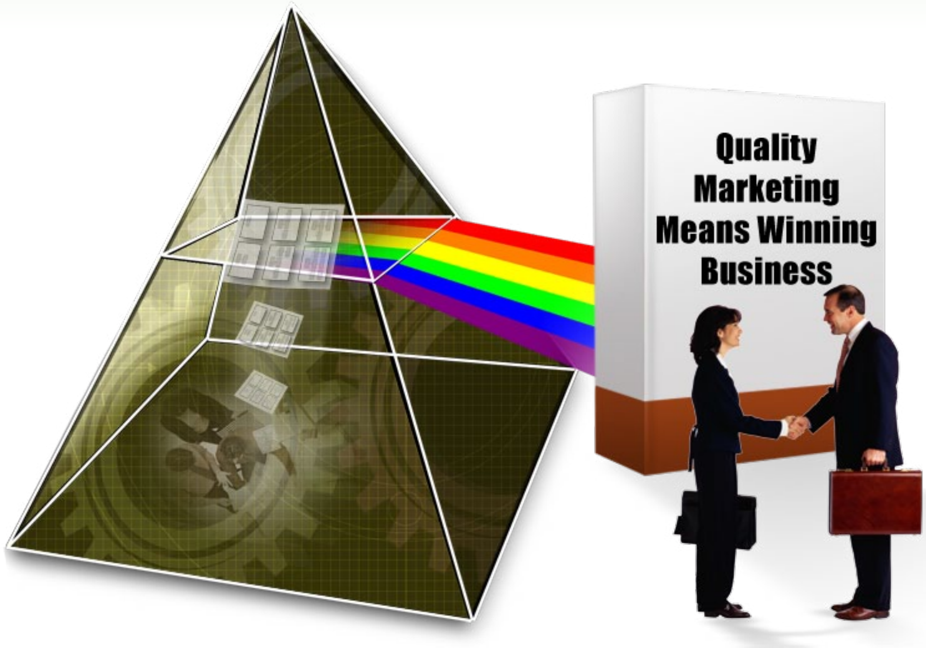

More than 290 people registered to attend Professional Day 2009.


Thanks to the Professional Day Committee who spent a year planning the event.

The APMP NCA Chapter would like to thank Northrop Grumman and in particular Ms. Rufus Shockley, for the donoation of its auditorium and the assistance of its many staff members. Northrop Grumman has supported this event for more than 15 years and has played an integral part in helping our chapter continue to grow.

Writer's Roundup:
Projecting a Quality Image

Patricia Kent



Guided by my fervent belief that effective writing is essential to every aspect of our industry, I have submitted an article for the *Executive Summary* on writing tips for the past two years. I have truly enjoyed sharing my lessons learned with you. Writing should be enjoyable and rewarding. More often than not, the task is arduous, especially when produced under the pressure of document deadlines. I have tried to provide you a cache of writing tips and guidelines to help you feel more confident when applying fingers to the keyboard. Up to now, my writing tips have centered on grammar, style, and document structure. For this article, however, I made a slight change in direction so I could focus more on this Executive Summary's theme—Marketing.

Ah! Marketing, the art of placing one's product or service in the hands of potential customers! As a proposal manager, my regular encounter with marketing is the weekly business opportunity meetings where I listen intently to our business developers explain their strategies. Beforehand, each works diligently to prepare a strong case. As they bring their statistical presentations to a concluding crescendo, we look for the approving gleam in management's eyes that says "Qualified." I take note and brace myself mentally for the upcoming proposal and its associative writing assignments.

Obviously, proposals are sales documents. Beginning with the Executive Summary and on through each volume and sub-section, the intent is to weave a well-designed marketing plan. Each sentence and paragraph should work toward the goal, employing effective writing skills to help achieve the desired win. Word selection, sentence structure and length, and document organization all play a significant role in delivering a persuasive message.

But let's go a step further. What about corporate branding? Do your documents have a corporate signature? Do they reflect the image your company wants to project to the industry? Maybe the potential client has received documents from you before. If so, have you been consistent? From the binder cover, title page, and letterhead to every graphic, table, and the last page of text of every volume, does the submission hold true to your company's image?

It is not just major sales documents, like proposals, that are important. On the contrary, e-mails and templates for resumes, past performances, and response documents should represent your firm with the same clarity, professionalism, and consistency. Everyday written communication represents your company by exhibiting your company logo, standard color pallets, and document styles.

Another consideration is any change your firm may experience—such as mergers or acquisitions. These events can be challenging to the marketing activities of any organization. The change not only affects business cards and web sites; it also affects every written document, which becomes a part of your contractual obligation to the customer. As we promise our customers a smooth, uneventful contract transition, organizations must exhibit a branding transition which assures current and potential customers of ongoing quality and exemplary business standards.

Write for quality! Write for image! Write for winning business!

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 grammer and business writing.

Are Consultants the Answer to Your Proposal Challenges?

This is the first in a multi-part series of articles on proposal development consultants and how they can help solve your most common proposal challenges. This article explores the rationale for hiring outside consultants when internal proposal development resources are in short supply.

Chris Simmons, Founder and Principal Member
of Rainmakerz Consulting

One of the most common proposal challenges consistently identified by proposal professionals is the lack of available resources to do the job. In a recent survey published in the Journal of the Association of Proposal Management Professionals ("The Big Proposal Management Study," Spring/Summer, 2009), 66 percent of those surveyed cited lack of resources as their biggest challenge, something that should come as no surprise to anyone reading this article. So, when is the right time to seek help and what is the best way to fill the proposal resource void?

When do you need help and how much help do you need?

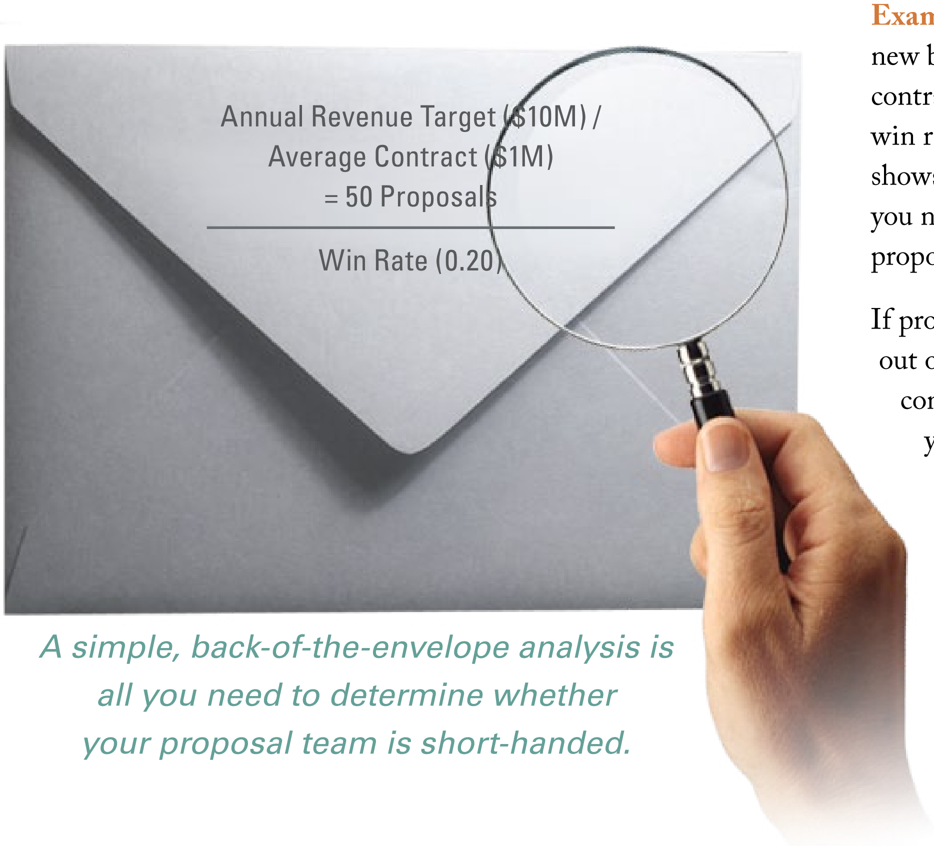
A simple, back-of-the-envelope analysis is all you need to find out whether your proposal team is (or will be) short-handed. If a proposal response is imminent, start with an organization chart that includes the required roles, e.g., proposal manager, volume leaders, writers, Subject Matter Experts (SMEs), capture managers, editors, etc. Place the names of qualified, available people in each of the boxes. (On smaller proposals, the same person's name may appear in more than one box.) Look for major skill or people gaps and discuss trade-offs and constraints with your team.

If you have the luxury of planning ahead, the answers to a few simple questions may determine whether you may require additional resources.

1. What is your new business revenue target for the next 12 months?
2. How much of this new business is likely to require a proposal?
3. What is the average contract size?
4. What is your estimated win rate?

Example: Let's say you have a $10 million new business revenue target, your average contract size is $1 million, and your estimated win rate is 20 percent. This simple formula shows that to meet next year's revenue target, you need to respond to at least 50 qualified proposals to reach your target.

If proposal due dates were evenly spread out over the year, and response times were consistent, you would be finished with your analysis. Another reality is that the government , at times, may decide to pull the solicitation and have the work done in-house.Given this inherent lack of predictability, it is quite possible (in fact, almost certain) that three or four proposals may be due during the same time,



A simple, back-of-the-envelope analysis is all you need to determine whether your proposal team is short-handed.

while the proposal team remains idle during other times. Conclusion? You will need some amount of additional proposal development help this year.

$$\frac{\text{Annual Revenue Target (\$10M) / Average Contract (\$1M) = 50 Proposals}}{\text{Win Rate (0.20)}}$$

How can you fill the resource void?

Following are three of the most common solutions to fill the proposal resource void:

1. Beg, borrow or steal additional resources from other internal (business or operational) groups
2. Recruit and hire new, full-time, proposal development employees
3. Hire external proposal development consultants.

Beg, borrow or steal from within. In times of need, many organizations secure proposal resources from other operational units within the company. These resources are very often billable Subject matter experts (SMEs who are currently working for one of your customers or temporarily on the professional services bench.

Unfortunately, most SMEs :

1. Don't have significant proposal writing experience
2. Don't know how to communicate basic business ideas
3. Don't know how to craft a compelling proposal story
4. Have a full-time customer commitment and simply don't have the time.

More often than not, using internal resources leads to frustrated SMEs who may have trouble meeting the required deadlines, deliver poor quality work, or otherwise drag the team down into a proposal vortex.

There are exceptions to every rule, but it's important to remember that the most accomplished SMEs who are pressed into proposal duty likely represent some of the best employees on the payroll. The real cost of making these superstar employees non-billable for any length of time, combined with the lost opportunity costs of taking them away from their happy customers, makes this an all around tough sell.

Recruit and hire new, full-time employees. The most predictable aspect of the proposal world is just how unpredictable the workload peaks and valleys are. When was the last time a request for quotation, proposal, or other information actually arrived on the planned or promised date? Unless organizations are sufficiently large to absorb additional overhead costs, or they're smart about using resources for other non-proposal work, recruiting and hiring full-time help can be a tricky and expensive undertaking.

Many full-time proposal employees have extensive experience, but often have long tours of duty with the same company. Unless they are active members of a professional proposal association, such as the Association of Proposal Management Professionals (APMP), their experience and capabilities may be one-dimensional or not up-to-date with current best practices.

In today's marketplace, the true superstar employees are in increasing demand and limited supply. A number of companies (especially the larger ones) have recognized this and have found ways to keep their best and brightest from looking elsewhere. Another challenge is finding a good cultural fit for a new hire in an industry that has a well-earned reputation for too much work and not enough pay. New employees with an entrepreneurial spirit, an interest in more diverse assignments, and the need for flexibility are likely to leave the ranks of full-time employment at some point to set up shop for themselves as consultants.

Hire external proposal development consultants. The current recession has in many ways created the so-called perfect storm for hiring external proposal consultants. The stimulus package is generating an unprecedented increase in the number of federal procurements. Many companies have downsized to cut costs, while others are relying more and more on temporary and contract consultants to gain a competitive edge. Following are three common reasons companies hire consultants to fill their proposal development needs:

1. Alleviate the crisis crunch. Companies often wait until they have reached a crisis before they seek outside assistance. A typical call for emergency proposal support requires immediate attention (within 24- to 48-hours) or the proposal will be in serious jeopardy. This unplanned situation requires a damage control expert who can operate like the head surgeon of a

MASH unit, putting in long hours during nights and weekends to rescue the proposal patient.

Proposal consultants are uniquely qualified to assist in times of emergency. They are pre-programmed to step into the proposal crisis quickly, assess the damage, and deliver immediate results without the time-consuming distractions and politics often faced by the rest of the team.

2. Increase proposal development efficiency (minimize the pain). Most organizations have fluctuating proposal needs that require specialized skills, but these needs are often not sufficient in scope and duration to justify hiring a full-time employee. Even if full-time staffing levels are generally aligned with steady-state demand, proposal assistance is often needed to supplement expected staffing fluctuations. These fluctuations can be the result of unanticipated workload peaks or to cover staff taking scheduled vacations or extended leave. Then there are the employees who simply have reached their limit and need a break from giving up their nights and weekends.

   External consultants can relieve the pain caused by proposal development resource gaps or other process inefficiencies. They bring specialized skills and experience for concentrated bursts of activity so that you can redistribute the workload for a discrete set of tasks over fixed periods of time. Once the task is completed, or your resource gap is otherwise filled, you can either say goodbye to the consultant or keep him or her around to focus on more strategic needs—until the next proposal wave hits.

3. Increase proposal development effectiveness (maximize the gain). Sometimes companies have the foresight and discipline to take an objective look at their proposal development people, processes, and technology infrastructure. By looking at each element closely and objectively with an outside consultant, organizations can find ways to improve each component. The resulting operational efficiency gains lead to improvements in overall proposal quality, and ultimately result in higher win rates.

   Proposal consultants can provide a number of benefits in this area—new ideas, processes and procedures, methods, templates, and other tools. Consultants are uniquely positioned to deliver fresh, unbiased opinions and practical recommendations that are largely unencumbered by either personal or political agendas. They can bring clarity and attention to an initiative that is oftentimes difficult to achieve with internal resources (who are either too close to the problem or lack significant experience outside their own organization) to bring an informed external perspective. With outside help, your on-staff proposal resources can spend more quality time on the proposal at hand, devote attention to other bids, catch up on other professional responsibilities, or even enjoy a weekend with family and friends.

Despite these compelling reasons to hire outside assistance, many companies seem to find more reasons not to hire consultants. The next segment of this series explores some of the reasons why companies don't hire outside help—even when they desperately need it.

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 comments or questions about this or other challenging proposal issues to Chris at chris@rainmakerz.biz or 202.255.2355. Visit www.rainmakerz.biz.

Four Executive Summary Mistakes That Hurt Your Chances of Winning

Olessia Smotrova-Taylor, OST Global Solutions, Inc.

Much is written on the subject of Executive Summaries, but over the years, these pesky proposal pieces don't seem to get much better. I have seen a few good ones, but most were in dire need of improvement. Make sure to avoid four common errors so that your Executive Summaries help your proposals rather than actually hurting your chances of winning.

Mistake #1: Believing the Executive Summary is not important and no one cares about it

We've all seen plenty of bad Executive Summaries – the kind that make you fall asleep. They start with "We are pleased to submit…" and then go into long descriptions of the company. They are full of "fluffy" words such as "world class" and "premier." You can't help but believe that your customer hates reading all this gobbledygook just as much as you do, so why waste your time writing it? If the customer doesn't required an executive summary, why should you include it?

your proposal is worth their careful reading

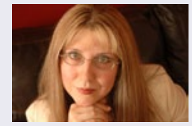
While it is true that Executive Summaries usually are not required, and are not scored, they are an extremely important part of any proposal. A **well-written** Executive Summary is a crucial marketing and sales piece. It impresses the Source Selection Authority and members of the Source Selection Evaluation Board with your expertise, professionalism, and comprehensiveness of your offer, as well as your understanding of them and their needs. It convinces them that your proposal is worth their careful reading versus just getting through the document.

A rigid page count limitation or a restrictive response structure is never a good reason not to write an Executive Summary. Even with five-page task order responses, you can include a short summary that covers the gist of your offer and the key benefits to the customer. You could include a great summary as an introduction to each major section, or even include it in a cover letter or email accompanying your proposal.

Contracting officers often share your executive summary with the evaluators even if it isn't required – that is, if it's actually good. If it is typically poor, it remains in the contracting officer's file.

Mistake #2: Getting a late start on the Executive Summary

Many companies treat their Executive Summaries as an afterthought, or start way too late in the process. They hold the mistaken belief that the Executive Summary should be written at the very end, after the proposal is basically done. When this happens, there are **simply not enough review cycles** to perfect this key part of the proposal.



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

Many still debate when to write an Executive Summary–first or last? Typical proposal writing courses encourage you to write the Executive Summary first. Then there are the rebels who say, "But the Executive Summary cannot be written first because we don't know what we're writing about; we're still developing and iterating the approach." Their reasoning goes something like this: toward the end of the proposal we will know the topic and all the Win Themes a lot better than we do when we're just starting out. So we should postpone the writing until the proposal is almost done.

The problem with starting the Executive Summary at the end is that it doesn't allow for sufficient review cycles to sharpen and hone the arguments, and to make this very important part of the document shine—and sing! There is no chance to polish and refine the details. This is a sure-fire recipe for creating an unprofessional document full of bloopers or even basic grammar and spelling errors that create a bad first impression. In addition, you lose a great opportunity to focus and guide your proposal team, which is one of the key purposes of an Executive Summary.

Mistake #3: Failing to speak to your customer's needs

One of the most common mistakes is to talk about your company and your team's capabilities, and how great you are at the beginning, continuing throughout, and at the end …and in the process, forgetting to even mention the customer, their needs, and their requirements.

My favorite blunder in this category is summarizing a company's entire history, philosophy, and values in the Executive Summary. This is a trap that small businesses especially seem to fall into.

stress the benefits that are important to the customer in response to their hot buttons

It's important to remember that while your track record and your history are exciting to you, they're not all that exciting for the customer. All *they* really want to know is *what you plan* to do for them! What you want to stress are **the benefits** that are important to the customer in response to their hot buttons, what keeps **them** awake at nights worrying, what gives meaning to their work and their lives, and *what they've told you they need in their RFP*.

All your win themes, salient points of the approach, and experience credentials need to ***relate directly to what the customer has told you they care about the most. Your executive summary has to answer the questions***:

- **WHY are you bidding?**
- **WHAT's in it for the Customer?**

Mistake #4: Wandering aimlessly without a clear structure

Most executive summaries don't have a clear structure. They start with a dry bureaucratic opening, wander aimlessly, and close with a whimper. They leave evaluators cold. Other industries, such as sales and advertising, have figured out long ago that there should be a SPECIFIC ORDER in which to present a convincing argument to make a sale. Otherwise, why would there be a billion-dollar industry that makes you whip out a credit card when you see an infomercial or an online product sales page – without as much as a live sales person persuading you to buy?

The Executive Summary is first and foremost a sales document. It is not really a "summary." It is a very purposeful persuasion piece that is meant to convince, cajole, sway, and lead the evaluator to the only logical decision regarding their procurement — to choose you!

You have to structure your summary in a formulaic way to make a powerful argument. It is not random. The formula I recommend for executive summaries is composed of six parts:

1. The hook that gets your customer interested
2. The overall value proposition that relates your win theme to the hook
3. The introductions for you and your team
4. The body – the actual overview of your offer (which could be presented in different ways depending on the type of proposal)
5. The roadmap showing your proposal structure
6. The call to action

When you organize your executive summary in this manner, your very structure makes your document more convincing, in addition to the points you make within the confines of this structure.

Olessia Smotrova-Taylor is president and CEO of OST Global Solutions, Inc. (www.ostglobalsolutions.com), a consulting and training company that helps businesses grow by winning government proposals. She is also the author of ***Executive Summary Secrets***, a brand new self-study course on how to write high-impact executive summaries. You can find it at www.ostglobalsolutions.com/execsumsecrets. Olessia can be reached at 301.384.3350 or via email at otaylor@ostglobalsolutions.com.

Membership Corner

Chris Simmons, NCA Membership Committee Chairman

Despite the challenging economic times, 2009 is turning out to be a great year for APMP and the local NCA Chapter. In the first nine months of this year, NCA affiliated membership has grown by 24 percent – an average of 30 new members each month. Total membership for the chapter as of December 4, 2009 is 955 members and is expected to eclipse the 1,000 member mark in the first quarter of next year.

If you're not already an APMP member, this is a great time to join and affiliate with the NCA chapter. In addition to the Executive Summary e-zine and access to the chapter body of knowledge, you get "NCA members only" discounts on all of our educational events. When you add up the savings, that's almost enough to cover your annual dues for the entire year!

Join APMP today: https://www.apmp.org/siteSpecific/customer/register_accountData.aspx

Thank you for your continued interest and participation in APMP and local NCA Chapter events. We look forward to another great year for our members. If you have any questions about our chapter or committee participation, please contact Chris Simmons at chris@apmpnca.org or 202.255.2355.

NCA Membership Profile
(As of December 4, 2009)

- 305 new members in 2009
- 21 new members in November
- 955 total members (854 affiliated/101 non-affiliated)
- 24.31% net affiliated membership growth to date

Special Points of Interest

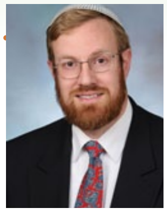
As an added value to our members, APMP-NCA has expanded the posting timeframe of our job board listings. Job postings now run on the board for 90 days. The price per posting is $65. Check out www.apmpnca.org/find_a_job.html

New Member Profile

Ruth Zein, Consultant

Company	Krall Consulting
What made you decide to join?	I wanted to increase my expertise in capture management and proposal development.
What is your biggest BD challenge/issue?	I locate teaming opportunities in key markets and brand my clients for success.
How did you originally hear about APMP?	Through one of the APMP-NCA Board Members that I worked with when he provided consulting services to my company.
What is your current BD role/responsibility?	To develop new business in key verticals and strategic client bases.
What do you hope to get out of membership and NCA affiliation?	I want to meet BD and capture professionals and learn best practices from leaders.
Fun Fact	I love to cook and I write a food blog with a friend. Check out www.davidstable.com.

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



Legal Corner: Can I Make That Call?

Marketing and the Procurement Integrity Act

Shlomo D. Katz, Counsel, Brown Rudnick LLP

As seasoned capture professionals know, an important part of the "win" strategy is selling your product or service to key Government decision-makers before the procurement has begun. As those same professionals also know, there is a point when agencies will no longer allow such "sales calls." What is not always clear is where those restrictions come from, and when, to whom, and to what they apply.

The Federal Acquisition Regulation ("FAR") encourages "[e]xchanges of information among all interested parties, from the earliest identification of a requirement through receipt of proposals." [1] The FAR explains that the purpose of exchanging information is to improve the understanding of Government requirements and industry capabilities, thereby allowing potential offerors to judge whether or how they can satisfy the Government's requirements, and enhancing the Government's ability to obtain quality supplies and services at reasonable prices, and increase efficiency in proposal preparation, proposal evaluation, negotiation, and contract award[2].

In contrast, exchanges with industry after receipt of proposals are limited by FAR § 15.306(e). Moreover, the FAR cautions, even exchanges before receipt of proposals must be in accordance with FAR § 3.104, the FAR section that implements the federal Procurement Integrity Act ("PIA" or "the Act").

The PIA protects the integrity of the procurement system by (1) regulating access to procurement information, and (2) regulating employment discussions between agency officials and actual or potential contractors. The article will not address the latter aspect of the Act. With respect to the former, the PIA prohibits present or former Government officials, as well as certain consultants to the Government, who by virtue of their positions have or had access to contractor bid or proposal information or source selection information, from knowingly disclosing such information before the award of a Federal agency procurement contract to which the information relates.[3] Also, the Act prohibits any person (including bidders) from knowingly obtaining contractor bid or proposal information or source selection information before the award of a Federal agency procurement contract to which the information relates.[4]

Note that the PIA and the implementing FAR regulations do not actually prohibit bidders from meeting with agency officials before the due date for receipt of proposals. To the contrary, FAR § 3.104-4(e)(3) states: "This section does not restrict or prohibit . . . [i]ndividual meetings between a Federal agency official and an offeror or potential offeror for, or a recipient of, a contract or subcontract under a Federal agency procurement, provided that unauthorized disclosure or receipt of contractor bid or proposal information or source selection information does not occur[.]" Nevertheless, agencies tend to establish, either by regulation or less formal means, a cut-off point after which all contacts between bidders and officials involved in the procurement are prohibited. Sometimes this information is contained in the Source Selection Plan, which is not a public document.

The prohibition on obtaining source selection information does not extend to information that is already public.

Thus, the Government Accountability Office ("GAO") denied a protest against an award where the eventual winner called a "friend" in the agency and obtained historical information about predecessor procurements.[5]

In a protest involving a procurement for a helicopter avionics system, the protestor (Lockheed) complained that a member of the source selection team had talked to a competitor (IBM) at a trade show and had made suggestions about how IBM could improve its design. The official admitted that he had sat in the mockup of IBM's cockpit and offered some comments. Nevertheless, GAO denied the protest because the design elements that the official had discussed with IBM played no role in the selection decision.[6]

One final observation: If you believe your competitor has benefitted from a violation of the Procurement Integrity Act, *do not sit on your rights*. A protest against a PIA violation is foreclosed forever unless, within 14 days of when you learn of the potential violation, you inform the agency of your belief that a violation occurred.

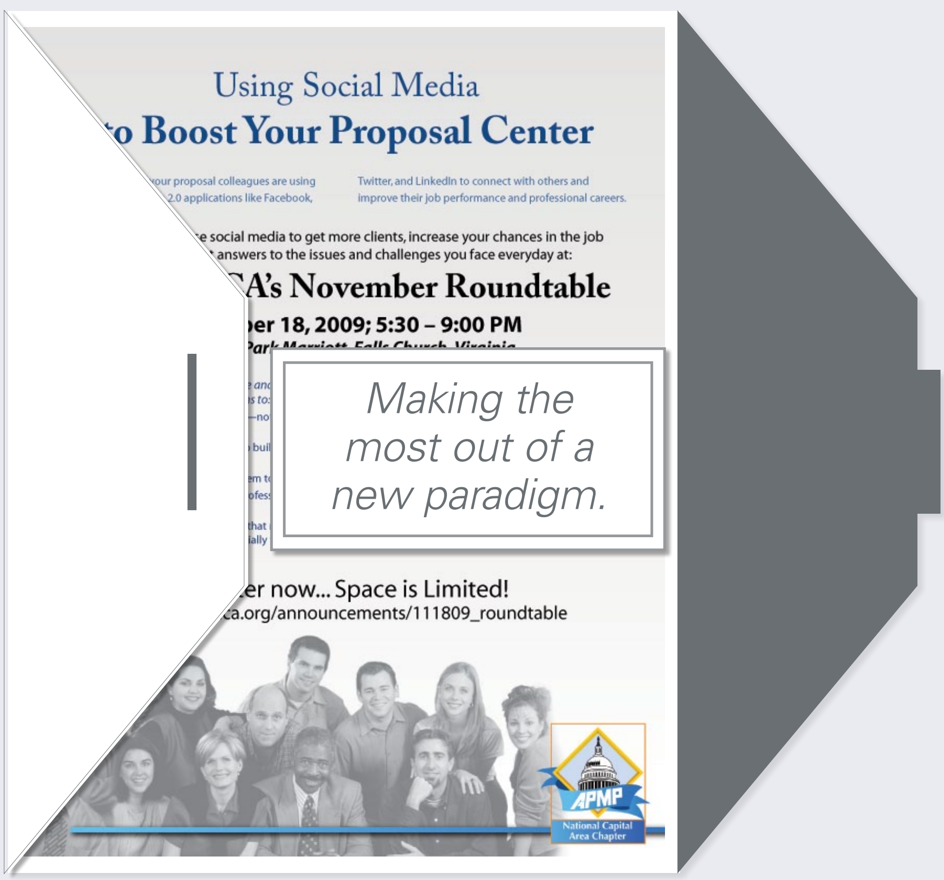
1. *FAR § 15.201(a).*
2. *FAR § 15.201(b).*
3. *FAR § 3.104-3(a).*
4. *Id., paragraph (b)*
5. *Gold Appraisal Co., B-259201, 95-1 CPD ¶ 144.*
6. *Lockheed Aircraft Service Co., B-255305, 94-1 CPD ¶ 205.*

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 skatz@brownrudnick.com.

Social Media Event Points to the Power of the Web

Facebook. LinkedIn. Twitter. As busy proposal professionals, we face a dizzying array of choices for social and business networking. The November 18 APMP NCA Roundtable focused on one of those choices—**Using Social Media for Business and Professional Development**. The presentation explained how best to leverage Web 2.0 to market yourself and your company, gather free business intelligence, and make the most of the new paradigm of information sharing. Three panelists—Betsy Blakeney, Senior Proposal Development Manager at CACI, Inc.; Kelly Olson, Vice President of ConnellyWorks, Inc.; and Catherine Read, Owner of Creative Read, Inc.—discussed tips and tricks to take networking to new levels using effective time management.

Several interesting facts were revealed. For example, if Facebook was a country, it would be the world's fourth largest; 80 percent of all companies use LinkedIn for recruiting; and you can send your Twitter "tweets" to both LinkedIn and Facebook to maximize your message. Panel Moderator Briana Coleman, Senior Consultant at Lohfeld Consulting Group, moderated a lively discussion that focused on moving from passive participation to active contribution.



Making the most out of a new paradigm.

A Publication of the Association of Proposal Management Professionals National Capital Area Chapter

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.

Special thanks too ...

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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.

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