Spring/Summer 2010
Volume 16, Issue 2

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

National Capital Area Chapter

GOVERNMENT & COMMERCIAL PROPOSALS

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PROPOSAL TIPS, TRICKS, & SECRETS

EXECUTIVE **Summary**

A Free Education

by: Brenda Crist

A busy executive who was running multiple proposals was little exasperated about the quality of the work being generated. He asked me how he could train his staff members to turn out better proposals? He also said he did not have a lot of money to pay for training. His question made me think of the great training materials available on the APMP National Capital Chapter (APMP-NCA) Body of Knowledge that are free to members who want to improve their skills or help train co-workers.

So I challenged myself to come up with a curriculum for training busy professionals in proposal best practices using our APMP-NCA Body of Knowledge materials. These materials consist of presentations from our Roundtables, Proposal Basics Boot Camp, and Annual Conferences (formerly Professional Day) going back to 2002; Executive Summary eZine articles dating back to 1998; and APMP Perspective Journal Articles dating back to 1990.

You can find the APMP-NCA Body of Knowledge on the Body of Knowledge tab on the www.apmpnca.org web page. After you click on the tab, you will be asked for you user name and password. Your password is your membership number. If you forgot your user name or password, click on one of these links:

- Forgot your user name or password?
- Access the user name and password we currently have recorded for you.

Right now the presentations and articles are arranged chronologically. We are currently working on updating our web page to add a search engine and content management system. Here are ten of the many great presentations you might share with your co-workers.

Brenda Crist has 25 years of experience providing capture, proposal, and program management support for information technology companies serving the Federal market. She is currently the Managing Director, Strategic Solutions at the Lohfeld Consulting Group. Prior to becoming a full-time proposal professional, Ms. Crist served as a Group Manager for OAO Corporation and Project Manager for Harris Corporation. She has provided system, application, and network management solutions for civilian and military clients. She is the President of the APMP National Capital Area Chapter and was a speaker at the APMP National Conference in June 2009. She holds a Masters Degree in Public Administration from American University and is ITIL and PPM.APMP certified.

APMP-NCA Body of Knowledge

	Title	Author(s)	Date	Learn How to....
1	How to Create Compelling Win Themes	Jim McCarthy, Joe Nocerino, Chris Simmons *Roundtable*	3/2010	• Create compelling win themes that resonate with the client • Develop focus boxes that attract your client's attention • Craft concise win theme statements
2	Best Practices for Planning and Preparing Executive Summaries	Edward P. Becker, Jon Rodriguez, Bob Weissman *Professional Day*	9/2007	• Plan and write winning executive summaries • Create outstanding graphics for executive summaries • Incorporate Red Team feedback in your executive summary
3	Turning Sophisticated Ideas into Pictures	Mike Parkinson *Professional Day*	9/2009	• Breakdown complex ideas into items you can illustrate • Use graphics to answer your client's questions
4	Applying a Peanut Butter and Jelly Model to Understanding and Approach Sections in Your Proposal	Bob Frey *Professional Day*	9/2009	• Write an understanding and an approach and learn the difference between the two • Communicate your understanding of your clients mission, challenges, and opportunities
5	Coaching Non-Professional Writers to Get to Blue	Olessia Smotrova-Taylor, Lynn Ann Casey, John Lauderdale *Roundtable*	9/2008	• Explain the writing process to a non-professional writer • Elicit solid and persuasive proposal sections • Create writing aids that improve your team's writing capabilities
6	Review Teams: the Good, the Bad, and the Ugly	Bob Weissman, *Professional Day*	9/2008	• Prepare a team to review your proposal • Conduct a review team that generates solid feedback • Deal with rogue reviewers
7	Crocodile Wingate Responds to Fast-turnaround Proposals	Beth Wingate, *Executive Summary eZine*	Winter 2008	• Use the nine-step process featured in this article for setting up a responsive, well-oiled proposal factory • Develop past performance and resumes repositories
8	Useful Elements for Measuring Writing Success	Pat Kent *Executive Summary eZine*	Fall 2008	• Write concise sentences using the Fog Index • Select the most accurate word for an intended action • Eliminate muddled wording and vagueness using false subjects
9	Art and Science of Capture Management	Bob Lohfeld, *Roundtable*	7/2007	• Qualify opportunities • Implement a solid capture management process • Help the capture and proposal departments function seamlessly
10	Case Study: Outsourcing Desktop Initiative for NASA (ODIN)	Eric Gregory, *Roundtable*	1/2004	• Assess your competition accurately • Develop a win strategy that maximizes your strengths • Develop a price to win strategy based on solid evidence

There is also a wealth of materials supporting, proposal management, proposal production, oral presentations, desktop publishing, and handling debriefs and protests available on the website for your use.

Ask the Graphics Guru

"I'm tired of using the same graphics in my proposals again and again. What do you recommend?"

by: Mike Parkinson

First, it is more important to be clear than clever. Focus on whether your graphic communicates the right information. If your graphic is already compelling, why change? Choosing a different graphic type only increases your risk of failure. You may be tired of your temple graphic—which looks like the Parthenon—but is your audience? Remember, you are creating your graphics to benefit your future client (not you).

However, there are hundreds, if not thousands, of different graphic types (depending on how you define each) from which to choose. In this article, I share ten seldom-used graphic types proven to successfully communicate a host of concepts. Your graphic must be interesting enough to hold your audience's attention yet simple enough to quickly communicate your solution.

Choose wisely. The wrong graphic results in failure, while the right graphic offers a host of benefits. Based on industry studies, the right graphic:

... Improves your chance for success by 43% (3M)

... Takes 40% less time to explain complex ideas (Wharton School of Business)

... Improves retention 38% (Harvard University)

... Communicates up to 60,000 times faster than text alone (3M)

... Improves learning 200% (University of Wisconsin)

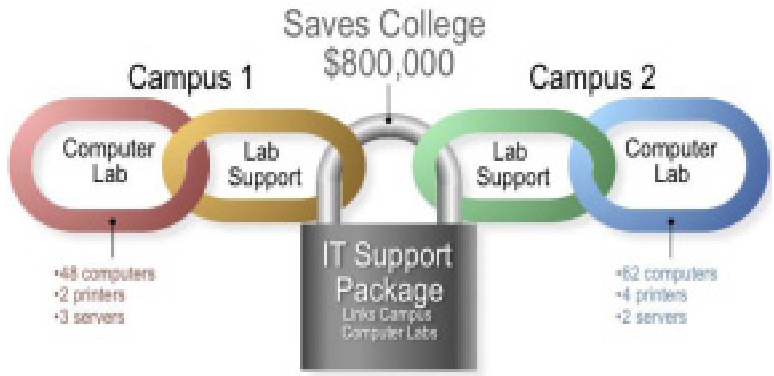
Let's look at alternative ways to present your content visually, amplify the power of your proposals, and increase your win rate.

1. Bridge Graphic

This graphic is a metaphor depicting the connection or transition between two actions, concepts, or entities. A bridge connects two separate pieces of land. It crosses over rough water or highways to allow vehicles and pedestrians to safely pass. A bridge graphic is a perfect way to show two entities transitioning into one. Operational flow, process solutions (overcoming the risky waters), system integration, and many other concepts can be succinctly communicated using a bridge graphic. (Should the graphic say "The proposed transition process means low risk"? You have already stated that transition in and of itself is inherently risky.)

2. Chain Graphic

Chain graphics show "linked" actions, concepts, or entities. Alternatively, chains illustrate restraint or security. Instead of a Venn diagram, what about a chain diagram? Instead of showing linked concepts with boxes and lines, show a chain of departments, processes, or people to convey the same idea. Use a lock to show a secure connection between actions or departments. Or just overlay the chain on top of items to demonstrate security.



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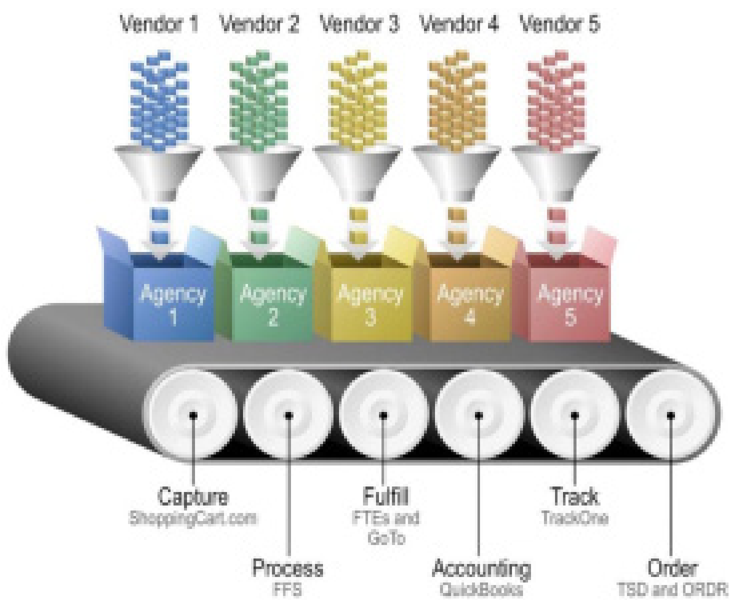
3. Conveyor Belt Graphic

This graphic is a metaphor that depicts a repeatable linear process. Conveyor belt graphics are a great way to show forward movement in a process such as assembling a product, recruitment and training steps, lifestyle enhancements, course overview, or system development.



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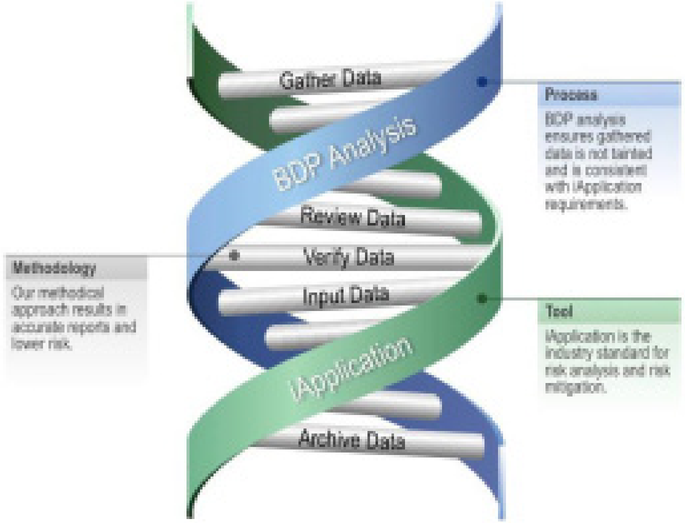
4. Dashboard

Dashboards present multiple metrics–potentially using multiple graphic types—in one consolidated format. It is a "holistic" view of information. On multiple slides, you have pie charts, a map, and a line chart—all relating to each other. Why not put these objects on one introductory slide to help your audience reach a desired conclusion. (You can then delve into the specifics of each piece on the subsequent slides.)

5. DNA Graphic

This graphic illustrates the synergy of multiple actions, concepts, or entities. Together, they combine to create a new, better solution (and breathe fresh "life" into the project). The strands of DNA can represent two key concepts (like a software tool and a corporate process) with the chromosomes connecting the two via common elements (like activities needed to combine the strand content).



6. Dome Graphic

A dome graphic looks like a "snow globe" illustrating the containment of elements. The dome graphic is great at communicating protection and security. Generally, you combine a "stacked graphic" (shown here) with the dome to show levels in a system, process, or methodology and how the levels relate to one another in a secure environment—the dome.

7. Fishbone Diagram

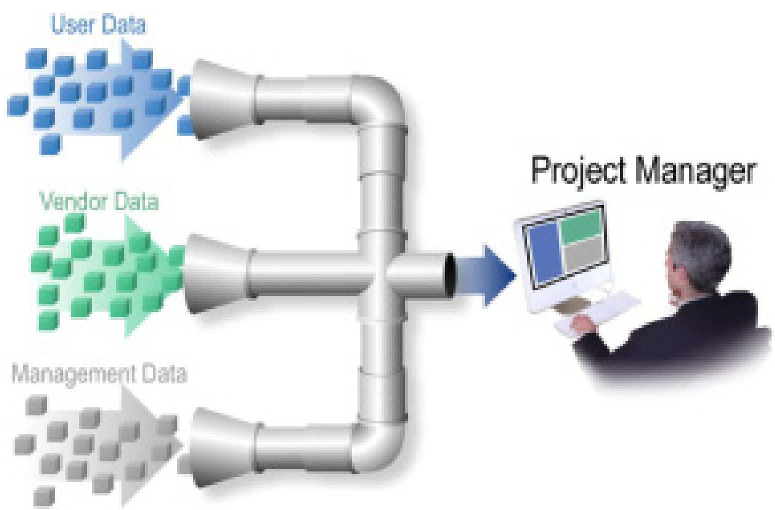
This graphic shows all factors that have an effect on a problem or objective. (Think cause and effect.) The small bones can represent categories, strategies, processes, and departments that join at the spine to create the final outcome.

8. Peg Graphic

This graphic shows the interconnectivity of actions, concepts, or entities to create a unified whole (think Legos®). Use a peg graphic for systems connecting and interacting with one another, building a process, or departments coming together to form an improved or upgraded solution.

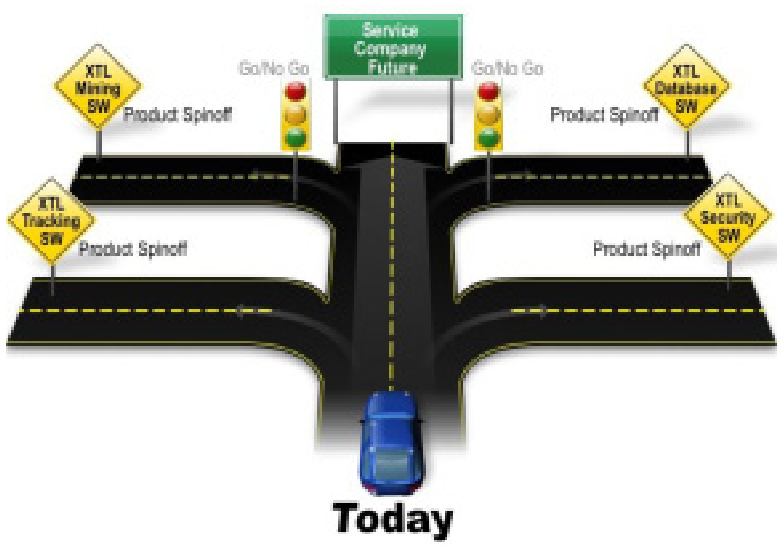
9. Pipe Graphic

This graphic metaphor represents the isolated flow of elements. Instead of using a flowchart, use a pipe graphic to represent concepts like consolidation, synthesis, or a combination. Inversely, a pipe graphic can illustrate dispersion or diffusion. Pipe graphics are versatile and can communicate a wide variety of concepts.



10. Road Graphic

This graphic is a metaphor depicting the path between the "as is" or "before" state to the "to be" or "after" state. Like the bridge graphic, a road graphic can show transition and a connection for a process or system. A road graphic is perfect for demonstrating a "future state" or a long-term goal that is "down the road." It could also be used to illustrate the goal reached at the end of the process.



These graphic types are the tip of the iceberg (to use a visual metaphor). To see more graphic types and get new ideas for visually representing information, go to the following:

1. BizGraphics On Demand

(www.BizGraphicsOnDemand.com) I recommend all of these graphic types. Most are appropriate for proposals.

2. Periodic Table of Visualization Methods

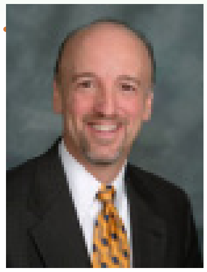
(www.visual-literacy.org/periodic_table/periodic_table.html) Use this site to get ideas. Choose wisely. I do not recommend some of the graphic types shown because they are inappropriate for our industry.

3. Google Images

(www. images.google.com): Try different word searches like "infographics" or "proposal graphics" and see what inspires you.

The next time you're faced with creating a graphic, try something different. Consider these graphic types and how you can communicate your ideas in new and fresh ways—and give your future client a winning proposal.

Mike Parkinson is an internationally recognized visual communications expert and 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.



Are Consultants the Answer? (Part 3): How to Find the Right Consultant

Take the time to think about—and write down—a description of the consulting services, capabilities, and experience you need

by: Chris Simmons

In Part 2 of this series we discussed some of the reasons why companies don't hire consultants—even when they need them.

Part 3 describes some strategies and tips for how (and where) to find the right consultant once you've decided to look.

The decision to hire a proposal development consultant is relatively easy compared to the more challenging task – how to find and hire the right one. It should come as no surprise that consultants work out best for companies who have clearly defined project roles, responsibilities, and capability requirements.

Start with a job description

Take the time to think about—and write down—a description of the consulting services, capabilities, and experience you need to complete your proposal. I use a simple one-page opportunity description that includes the following topics at a minimum:

- Position title (role and list of responsibilities)
- Qualifications and experience (number of years, specific methodologies, agency experience)
- Work location (customer site, home office, or both?)
- Period of performance (start and end dates)
- Relevant prospective customer and RFP information
- Relevant proposal team information
- Equipment requirements (does the consultant need a laptop?)
- Target weekly hours and total budget (50 hours per week is usually a good target)

Narrow down the field

In the Washington, DC, area alone there are literally hundreds of proposal development consulting companies and individual consultants. On the surface, Internet inquiries seem like a reasonable starting point, but this approach can be surprisingly ineffective and inefficient.

Consider these whopping results on a recent Internet search of "proposal development consultants in Washington, DC"—

- Google (187,000 results)
- Bing (839,000 results)
- Yahoo! (1,990,000 results)

Despite the power of these search engines, many of the first few electronic pages are filled with jobs posted by competitors looking for the same consultants you currently seek. Although some proposal development consulting companies and individuals are listed, many of these have either bought their way to the front pages or have used tech savvy tricks to achieve higher listings. Resist the search engine urge and consider taking a more focused and personalized approach.

Talk to friends and colleagues

A more effective approach is to start by talking to friends and colleagues who have had experience in hiring proposal development consultants. Since most companies use proposal development consultants at one time or another, it should be very easy to find a number of informed opinions from trusted sources on this topic.

Leverage your local APMP chapter

The Association of Proposal Management Professionals (APMP) is the de facto networking group for proposal development consultants. APMP has more than 3,500 members worldwide and more than 1,000 members in greater Washington, DC, alone. The local National Capital Area chapter website (www.apmpnca.org) lists 20 corporate partner companies. More than half of these companies specialize in proposal development consulting and have highly informed opinions on the pros and cons of local and national firms that can help (think free consulting). Pick a few companies that catch your eye and ask some basic questions about the market, consultant availability, and the reputations and value propositions of competitors.

Tap into the social networks

APMP and some local association chapters have a number of discussion groups on LinkedIn (www.linkedin.com) and other social networking sites like The Federal Contractor Network (www.tfcn.us). Join a discussion group and ask for recommended companies or consultants. Here are a few discussion groups for these two networks to consider:

LinkedIn: (APMP; APMP NCA Chapter; Proposal Writers Group; The RFP Database; Bid and Proposal Management Professionals; Capture-Planning.com; Consultants Network; Global Proposal Management Professionals).

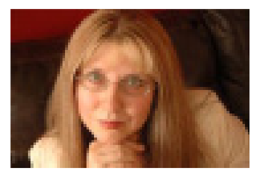
The Federal Contractor Network: (The Job Spot; Program/Project Management; Contract Proposal Professionals; APMP Members Circle; Subject Matter Expert Directory).

Once you have defined the services and capabilities you need and have narrowed down the field to a manageable number of options, you're ready to find the right consultant.

The final part (Part 4) of this series is focused on what makes a good consultant the right one for you.

Chris Simmons is the founder and principal member of Rainmakerz consulting—a business development solutions company specializing in all aspects of proposal development. He is also the Vice President of the local APMP chapter in the greater Washington, DC area. *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.

Back to Basics: Understand the Full Cycle of Business Development to Win More Contracts

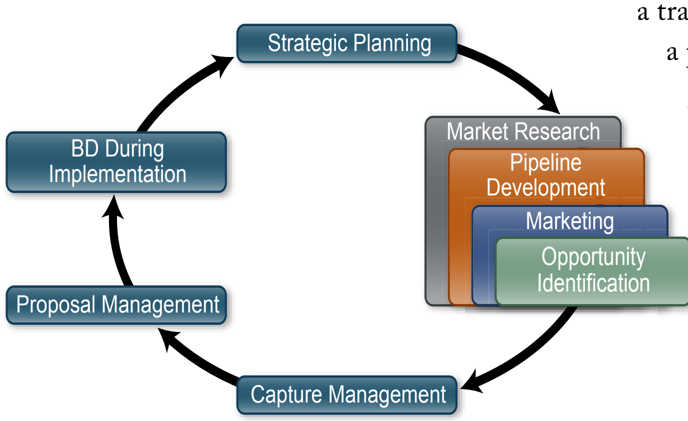


by: Olessia Smotrova-Taylor

When working on a puzzle, my five-year-old daughter knows to glance at the whole picture before starting to assemble the pieces. She is up to 30-piece puzzles now, which are quite complex. Her process is to study the picture, then find a corner piece to use as an anchor for adding pieces.

We, as adults, sometimes forget to take a step back and look at the whole picture first when we solve our own puzzles: how to grow our company, how to win a contract, or how to bring in revenue. This is why, to win more government contracts, we must step back and take a few minutes to ponder the full lifecycle of business development. This way we can be better at putting the pieces together.

Here is a typical business development lifecycle for a government contracting company.



Strategic business development planning is the first step - it is the corner piece of the puzzle. This first step is necessary because it will be your beacon when you start looking at a universe of opportunities. Businesses often fall into a trap of working without a plan; or they write the plan once and leave it to collect virtual (and physical) dust while they are engaged in routine, day-to-day operations. The trick here is to stick to the plan, update the plan, and avoid jumping at every opportunity that may have nothing to do with the plan but seems attractive at the moment.

Market research is the next step This step goes hand-in-hand with your strategic business development plan; it makes the whole planning process somewhat iterative. To plan appropriately, you need to know which vertical markets you are going to go into and what ideal customers are you going to target. This leads you to more detailed research, which then feeds your planning process.

Pipeline development is the natural outcome of your market research Now that you know which agencies and which areas you are going to explore, you need to zoom in and develop a list of opportunities to narrow down and focus on as you learn more about them. These opportunities will be in the **near term, with a request for proposal coming out in 1-6 months;** the **mid-term,** with an opportunity expected to open up in the next **6 months to 1 year;** and the **long term,** with an expectation of **1-5 years.** Some of the large and important opportunities may then make it into your strategic plan. These you may start calling strategic bids or must-win opportunities.

Marketing to the federal government is related to the overall effort of attracting customers to your company, and creating awareness of your brand and offers.

Opportunity identification

narrows down the list to the select few pursuits that you will dedicate a significant effort to pursue. Each of these individual opportunities then enters the capture phase.

Capture management

Capture often is the longest step in the business development lifecycle. It involves positioning yourself pre-proposal to win a specific opportunity. A proposal usually has a short deadline, whereas capture may take years. It doesn't necessarily mean working it for years full time, but rather, devoting years to deliberate activities that will lead you to the win. For example, I once ran a capture effort for two and a half years for a billion dollar plus pursuit, but spent only $50,000 on my time and the time of an entire team of specialists during the first two years. It was not until the last 6 months of the capture effort that we started spending more money.

Proposal management

Proposal management (or proposal preparation) is essentially just that: managing the development of a winning proposal document to deliver it by the deadline. It is an iterative process that usually involves multiple contributors and a set of reviews to check quality and progress. Here are some of the most important characteristics of a winning proposal, the majority of which stem from a well-run capture effort:

- Matching the solution with the customer's wishes and vision through a solid capture effort
- Using a great process that gets you to the deadline without undue stress and allows you sufficient time to polish your document
- Providing targeted features and benefits with a clear value proposition.

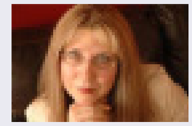
BD During Implementation

The reason contract delivery is part of the business development lifecycle is simple: once you have a government contract, the ground is ripe for adding scope (this is called "an up-sell" in sales).

Your staff members working on site with the customer are your eyes and ears if you train them correctly in the capture process. The staff can identify the need for additional work, and inform your business developer. Your business developer will pay a visit to the government representative and learn more about the requirements. They can then use this information to submit a white paper or an unsolicited proposal. This could result in adding scope to your existing contract.

Your staff on the ground can also tell your business developers about other requirements that may yield themselves to adding scope. These are new additions to your pipeline and ones that are infinitely more valuable than others because you get to hear about them early.
Also, they come from an existing customer with whom you have developed a trusted working relationship.

During implementation, you also generate past performance track



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
President/CEO, OST Global Solutions, Inc.
Executive Summary eZine Chair
and Editor

record that you can leverage in your next proposal. On the other hand, if you don't do well, then you get to tarnish your record with the government very quickly. Unfortunately, this record can proliferate from this customer to other government agencies through various past performance databases. So, once you have won a contract, do a great job. Do whatever it takes to deliver and please your customer.

So, now you have the big picture, and know how all the pieces of the business development puzzle are supposed to fit together. Make sure that you don't skip the important elements and you will win more.

Olessia Smotrova-Taylor is President/CEO of OST Global Solutions, Inc. (www.ostglobalsolutions.com), a Metro Washington, DC consulting and training company that helps businesses grow by winning government and commercial contracts. She is a practicing capture and proposal manager who won more than $16 Billion in new business. She has 15 years of experience in proposal and capture management, marketing, and communications. Her self-study course, *Executive Summary Secrets*, (www.ostglobalsolutions.com/execsumsecrets-embed) sells worldwide. She is also an instructor in the upcoming one-time only webinar series *"Blueprint for Winning Government Contracts for Small Businesses"* (www.ostglobalsolutions.com/blueprint) that shows how to catapult your business into aggressive growth in the federal market. Prior to starting her own consulting company, she won business for Raytheon and Lockheed Martin, and wrote for the Financial Times of London.

Writer's Roundup: Being Guided by the Basics

by: Patricia Kent

When I began writing the "Writer's Roundup" two years ago, I launched the series of articles by first focusing on "the usual basics." From there, I channeled my attention to several articles that addressed specific do's and don'ts. Now I have come to a juncture in my offerings where I re-address basic writing concepts—but from a slightly different angle. Here are my thoughts.

From writing a brief e-mail to constructing a substantial proposal section, writing involves more sub-skills than any other daily business task. When you think about it, writing requires the combination of processes that fall into two categories—physical and mental. For instance, physically you move a pen or pencil over paper, or depress keys on a computer keyboard to turn letters into words. Mentally, you conjure up the rules of grammar and syntax, organize your thoughts so they make sense, and pass your magic over the words to convey the intended message. Now, did I say magic?

Well, maybe that's not quite the correct word; but consider these six basic concepts. They can produce amazing results.

Focus – Center your attention on the plan and execution of what you need to write.

Purpose – What is the rationale behind your writing assignment? Facilitate your readers' decision-making by appealing to their intellect—their sense of purpose.

Meaning – Translate the purpose of your message accurately. For example, we often use the term "performance," but what does it mean to our readers? Does what they infer mean the same as what we imply?

Substance – Does the meaning behind your writing have credibility? Can you substantiate what you said? Or, do you allow the "corporate sales pitch" to overtake your factual intent?

Structure – This is your plan for executing all of the work you garnered. Use techniques that create flow, logical transition, consistency, and balance for a well-structured document.

Clarity – Galvanize your readers' attention. In other words, did the groundwork you laid produce a lucid and compelling story? Is the content self-evident? Is the style of writing simple and easily understood? Is there a clear flow, a rhythm to the text that keeps the readers' interest until the very last page?

I would have to say that these are different basics than what one would expect. They do not give exact step-by-step instructions on how to get from one point to the next, and there are no measurements per se. They are, instead, constructs for high-level thought. But they are, nonetheless, basics. They are theories that every writer should probe, digest, and apply in conjunction with the more clear-cut and extensive list of grammar rules.

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 education classes in basic grammar and business writing.

March Roundtable Report

by: Roundtable Committee

An Exciting APMP-NCA March Roundtable Discussion!

Perhaps one of the greatest challenges faced by proposal teams is how to develop win themes that capture the attention of reviewers and generate higher evaluation scores. The three speakers at the APMP-NCA Chapter's March Roundtable discussion debunked the myths and provided a road map on the topic of **How to Create Compelling Win Themes.**

Our first speaker, **Jim McCarthy**, CEO of AOC Key Solutions, set the tone for the evening's discussion with a presentation about the myths and facts of making a win theme stand out from the competition. He pointed out the fallacies under which many proposal teams operate when creating win themes. Because no generally accepted definition of a win theme exists, proposal professionals must apply their expert judgment to weed out the ho-hum and develop a customer focused, succinct, active, actionable, and quantifiable snippet that differentiates their solution from that of the competition. Jim also demonstrated the difference between ho-hum themes fraught with clichés and meaningless statements, and killer themes that include active statements and quantifiable claims.

Jim McCarthy can be reached at 703.868.8263, or by e-mail at jmccarthy@aoc-ksi.com.

Our second speaker, **Joe Nocerino**, CEO of Century Planning Associates, Inc., expanded on these thoughts with the suggestion that themes set the tone and expectation for the rest of the proposal. His primary thoughts were that a theme should be one sentence, boastful, make a differentiating statement that can be claimed only by your company, and include both a feature and a benefit that can be substantiated.

Joe pointed out that compelling win themes set your company apart from all other bidders in a positive way. Being boastful in your theme motivates evaluators to say, "Oh, really; Show me," and want to read more of your proposal. By working with managers who have direct customer knowledge, the proposal team can extract essential elements of customer intelligence that allows them to develop themes that will grab the attention and interest of reviewers. The addition of specificity and metrics combined with information that is not by itself differentiating can often be crafted into the differentiator that results in a winning proposal.

Joe Nocerino can be reached at 703.349.5271. His company information is located at www.centuryplanning.com.

Chris Simmons, of Rainmakerz Consulting, LLC, wrapped up the evening with a discussion about why evaluators pay attention to—and are influenced by—win themes. He suggested that an evaluator's time is limited and killer win themes make it easier for them to identify what sets you apart from the competition. Win themes transcend an entire proposal and can only be determined after individual proposal themes (volume, section, and sub-section) are established. These lower level themes focus on technical, management, past performance, or other volume subjects and lend themselves to a bottom up approach to evolve a compelling and customer focused win theme.

Chris' win theme techniques stress standard processes, tools and templates, a disciplined approach, and reduced use of boilerplate material. The result is a more efficient proposal team that works less and wins more.

Chris Simmons can be reached at 202.255.2355, or by e-mail at chris@rainmakerz.biz.

After the Roundtable discussion, a lively question and answer session underscored how important compelling win themes are to our business development community. The 280 Roundtable attendees took home valuable tips and techniques that will help to increase winning potential and build business.

Refresh your knowledge of winning practices on October 12 at APMP-NCA's Mid-Atlantic Proposal Conference and Expo

...an "expanded and impoved" version of Professional Day!

Take back the latest proposal development trends and techniques from respected professionals—and give your next proposal a winning edge over your competition.

Choose from among 20 skill-building sessions—across four new knowledge tracks:

- Best Practices in the Business Development Lifecycle
- Financial and Pricing Issues
- Small Business Focus
- Master's Track for Seasoned Professionals
- Plus three keynote plenary sessions

Renew your relationships with current colleagues—and meet new people to expand and enrich your professional network.

Get 8 Continuing Education Units toward your APMP professional accreditation!

APMP-NCA's Mid-Atlantic Proposal Conference and Expo
October 12, 2010; 8:00 a.m. to 5:00 p.m.

Fairview Park Marriott, Falls Church, Virginia
(Registration and Expo with continental breakfast opens at 7:00 a.m.)

Register early for the conference and save $50 at www.apmpnca.org…space is limited!

Oral Presentations: Key to Winning Government Contracts

by: Larry Tracy

Introduction.

The thrust of this article, as the title suggests, is winning government contracts through effective oral presentations. I believe even those who do not "sell" to the government can gain by the advice in this article. To paraphrase the late Frank Sinatra, *"If you can sell to the government, you can sell to anyone."*

The Federal Government, in recent years, has placed increased emphasis on the "oral presentation" in awarding contracts. Additionally, many Government agencies, in their Request for Proposal (RFP), stipulate that only those who will be working on the contract are to be involved with the oral presentation. This is obviously intended to permit Government agency evaluators to have an "eye-to-eye" meeting with those with whom they will be working, thereby resolving issues and questions before the contract is awarded.

There was also a significant change regarding visuals. Many RFPs require bidders to submit PowerPoint slides in advance to give evaluators a "heads-up." Changes are not permitted in the interim; therefore, presenters must be quite careful in developing these slides so as not to "freeze" their ideas.

Most companies have developed a skilled cadre of proposal writers, and probably feel a bit uneasy about having their economic future riding not on the verbal skills of engineers and technicians who have not been called on in the past to make marketing presentations. Now, however, the "doers" must become "sellers."

Proposal writers and oral presenters must realize that their efforts are not separate elements of the bidding process, but instead are joined at the hip. The proposal and the oral presentation are not ends in themselves but instead are an interdependent means to achieve the end result of winning the contract. The oral presentation can often be the deciding factor when the competing proposals are virtually identical in solving the Government's RFP-expressed problem.

The Three P's to Successful Orals.

The heart of my training/coaching for companies preparing to make an oral presentation for a government (or private sector) contract is what I call the **Three P's—Planning, Practicing, and Presenting**. Let's take a very brief look at how this three-step approach can lead to a successful, contract-winning oral presentation.

Step 1: Planning. Read the RFP from the Government's perspectives. The Government has written the RFP to solicit a solution to a problem, and is looking to the private sector for that solution. Admittedly, some RFPs are so opaque they seem to have been written by the Oracle of Delphi. But the responsibility to discern what the government wants lies with the bidding companies. Make sure you are doing what the government wants done, not what you want to do.

Involve Senior Management to Ensure Availability of Key Personnel.

Both the prime contractor and the sub-contractors must be willing to expend resources necessary to win the contract. This commitment must be made by senior management of all involved companies, and include making key experts available when required for brain storming and practice sessions, even during the June-August vacation timeframe.

Develop a Single Theme.

Think of this theme as the lead paragraph of an article in The Washington Post describing the program to be undertaken. When this theme is developed, all presenters must co-ordinate their presentations with this theme to produce clarity, cohesiveness and consistency.

Step 2: Practicing. Get professional help. The purpose of the Government's new emphasis on oral presentations is, of course, to have the people with in-depth technical knowledge make the presentation, not polished speakers who possess less-detailed knowledge of the RFP requirements. Still, the team of experts with the clearest and most professional presentation certainly increases its prospects of winning the contract. An outside speaking coach should be brought in to show the technical experts how to make a clear and effective presentation.

Solve the Early Visual Problem.

If the RFP stipulates that visuals must be delivered early, the potential problem of having the thinking and recommendations/solutions "frozen" to the slides already sent to the Government agency must be taken into account at the outset. When the visuals are being "built," they must (1) have the specificity to permit the evaluators to follow the presentation's general theme, main points, and recommendations, and (2) be sufficiently broad in scope to permit "fitting" in new ideas generated after the slides have been submitted. One person should be the coordinator of the visuals to verify consistency.

Conduct "Murder Boards."

These realistic practice sessions with colleagues role-playing the Government agency evaluators are the key to winning competitive presentations. Such intense practice sessions permit presenters to improve their delivery skills and anticipate questions and objections of the actual evaluators. The various "Murder Boards" should be videotaped, and the videotapes critiqued with little mercy. The following four areas, emphasized in the "Murder Boards," will pay off in the presentation:

1. **Hone Delivery Skills.** The purpose of the oral presentation is to transmit, clearly and persuasively, the vision of the bidding company as to how it intends to accomplish the RFP requirements. The technical experts making the presentation will concentrate on the WHAT of the presentation, while the outside orals coach provides valuable insight into HOW the speakers communicate their ideas to the evaluators. Poor eye contact and body language, as well as poor vocal inflection, especially monotone delivery and "uh's" and "Y'knows," can negatively impact the way a message is received. We like to think the lucidity of our presentation is more important than how we look and sound. Research has shown the overriding importance of non-verbal communication on audience perception of messenger and message. The outside coach earns his or her keep in showing how to blend substance with style.

2. **Focus on Probable Evaluator Questions and Doubts.** The Murder Board is to oral presentations what the flight simulator is to the pilot. It allows presenters to learn from mistakes, and anticipate questions and objections. Ideally, proposal writers should role-play the government evaluators. They can help the presenters develop a presentation which assuages any doubts the evaluators may have, and confirms consistency between the written proposal and the oral presentation. Probable evaluator questions can be answered in the presentation, thus delivering a "preemptive strike."

3. **Don't Read From a Script.** One of the greatest speaking errors of people not accustomed to presenting is to read from a script. Minimal eye contact is made with the audience, and the thought may occur to the evaluators that this person is reading words written by someone else. Note cards—3x5 cards are best because their size precludes writing too much—with memory joggers can certainly be used, but speakers should show they "own" the material.

4. **Don't Read the Visuals.** Few things alienate people more in any audience than to have the speaker read the words on the visuals verbatim. Speakers should reduce to a minimum the text on the visuals during the various "Murder Boards." To avoid falling into the "reading from the screen" trap, try this drill: position yourself with your feet pointed at the audience, and at such an angle

from the screen that turning to read will cause you discomfort. Don't make the pivot; keep those feet pointed toward the audience.

Step 3: Presenting. "Case the Joint." If possible, the entire presenting team should visit the room where the presentation will be made before the big day. Observe where the evaluators will sit, where the electrical outlets are located, if there are easels for flip charts (if permitted by the RFP). If the room lacks curtains or blinds, will sunlight at the time you are scheduled to present wash out the visuals? Can lights immediately in front of a built-in screen be turned off separately? If driving, determine the traffic and parking availability at the time you will be arriving for the presentation.

Use 3x5 Cards. One of the reasons that speaking in front of a group is the number one fear in America is the certainty many people have that their mind will go blank at a critical time. That is why so many make the mistake of reading their presentations. You can control this fear with just two 3x5 cards. On one card place an anecdote, quotation or statistic relative to the problem posed in the RFP. On the second card, place an outline of your presentation. If your mind goes blank, merely reach for the two cards together, and relate the information on the first card. You will probably recover from your temporary amnesia. If not, slide the second card to the front, and use it to see where you should pick up. The cards are "life preservers" when you are drowning in panic.

Stand While Presenting.

Inexperienced presenters will prefer sitting while making the presentation. It may be more comfortable, but the presenter who stands has better presence, better voice control, and better eye contact. All "Murder Board" presentations should be made while standing to help presenters get used to "being on stage."

The Question and Answer Session.

The RFP generally calls for a Q&A session for clarification purposes after the formal presentation. Unless the evaluators say they wish to direct their questions to specific team members, the team leader from the prime contractor should quarterback this session, directing questions to team members according to their respective expertise. The stress level on presenters will probably be less during the Q&A session because it will take place within the more familiar conversational context. But don't be lulled into a false sense of comfort. Practice Q&A sessions should be an integral part of the "Murder Boards" so as to anticipate the type of question likely to be asked. The Q&A session is where the evaluators' doubts and questions can be resolved, key points driven home by the presenters in their answers, and the confidence level of the evaluators with the ability of the team to "do the job" increased.

Some Final Advice.

Two statements, written many centuries apart, underline the eternal importance of speaking skills, especially when vying for contracts:

In his 1984 autobiography, Lee Iacocca wrote: *"I've known a lot of engineers with terrific ideas who had trouble explaining them to others. It's always a shame when a guy with great talent can't tell a board or committee what's in his head."*

About 2500 years before Iacocca's observation, the great Greek statesman Pericles wrote: *"Those who can think, but cannot express what they think, place themselves at the level of those who cannot think."*

Iacocca and Pericles have a warning for companies competing for contracts: *"Terrific ideas" can easily be trumped by those who can "express what they think."*

If your competitors are improving the presentation skills of their technical experts because of the importance they attach to oral presentations, while you rely on your "superior" ideas, programs, and experience, you may find your firm losing millions of dollars.

A small investment in presentations training can, therefore, pay large dividends when lucrative contracts are awarded.

President Ronald Reagan called Larry Tracy "an extraordinarily effective speaker." At the time, he was an Army colonel detailed to the State Department to debate controversial issues throughout the country. He had formerly headed the Pentagon's top briefing team, delivering daily intelligence presentations to the Chairman of the Joint Chiefs of Staff. He has converted this "real world" experience into coaching, and has been cited in several books as one of top presentation skills trainers in the country. He was the highest rated speaker at the APMP-NCA October 2009 Professional Day, will speak at the 2010 International Conference of the APMP in Orlando, and will be the keynote speaker at the APMP-NCA Annual Conference in October. He is author of the book The Shortcut to Persuasive Presentations.

Presented May 19, 2010 at the
Acquisition Solutions Inc. Annual Conference
Marriott Metro Center, 775 12th Street, NW Washington, DC

Presented by
Bob Lohfeld,
Lohfeld Consulting Group, Inc.

Lohfeld Resolution for Better Procurement

It is in our mutual best interests to conduct effective and efficient procurements that ensure industry provides their best products and services to support the government's mission.

Whereas, the government procurement community is charged with conducting efficient and effective procurements; and

Whereas, industry is charged with writing proposals for these services and products in an efficient and effective manner:

Resolved, by this Assembly,

We will improve procurement planning and communication with industry.

1. **RFP release date** – we will clearly communicate real RFP release dates so bidders have lead time to bring together their proposal resources. We will be sensitive to how expensive it is for bidders to assemble and hold their proposal resources in place while waiting for our RFP. We will not say the RFP will be out soon when in reality we do not know when it will come out.

2. **Delayed RFP release dates** – we will establish realistic procurement schedules and clearly communicate these to industry. We will not let the solicitation slip so far to the right that viable small businesses that invest years of effort into capturing and assembling a well-balanced team, etc., discover the RFP has slipped so much that they have graduated from the 8(a) or exceeded the small business size standard and can no longer compete as primes.

3. **Realistic procurement timelines** – we will give bidders a realistic timeline to develop their proposals that includes adequate time to receive and respond to questions and amend the solicitation accordingly, rather than issuing overly optimistic schedules and incrementally extending them, or even worse, making last-minute requirement changes to the RFP, but not extending the proposal due date.

4. **Balanced procurement schedules** – we will have balanced proposal schedules for proposal submission and award, and will avoid having industry prepare proposals within a tight 30-day response period and then let the government take 9 months to evaluate the proposals.

5. **Short procurement timelines** – we will establish realistic procurement timelines and avoid releasing a draft RFP at 4:00 p.m. the Wednesday before Thanksgiving Day with a deadline for questions of noon on Friday the day after Thanksgiving, and then releasing the final RFP at noon on Friday the day after Thanksgiving.

We will carefully select the procurement type and plan the RFP accordingly.

6. **Best value vs. low price** – we will ensure best-value procurements are designed so bidders can showcase their technical and management approach in such a way that these become discriminators and serve as the basis for selection and avoid letting low cost become the discriminating factor.

7. **Fixed price procurements** – we will ensure that only procurements with complete, logical, and consistent statements of work (SOW), clearly defined deliverables,

and unambiguous acceptance criteria are issued under fixed price procurements and not work that should be procured on a T&M or CP basis.

We will improve RFPs for more efficient proposal development and evaluation.

8. **Draft RFPs** – we will include a draft SOW or statement of objectives (SOO) and draft proposal instructions and evaluation criteria with the draft RFP so bidders can prepare their proposals when the draft is released.

9. **Instructions to bidders (Section L)** – we will write clear proposal instructions with the expectation that bidders will write their proposals to respond to each and every requirement of these instructions, and we will strive to eliminate redundant instructions that cause proposals to be written with redundant sections and/or cross references.

10. **Proposal evaluation criteria (Section M)** – we will ensure the evaluation criteria in Section M tracks one-for-one with the proposal instructions, does not call for evaluation of information not requested in the instructions, and does not suggest an outline that diverges from the proposal instructions.

11. **RFP format** – we will issue the RFP in a machine-readable format and not issue the RFP only as a PDF—or worse a PDF image—because industry will need a machine-readable RFP for proposal development.

12. **RFP boilerplate** – we will ensure the RFP and attachments are consistent across all sections and will avoid careless use of boilerplate cut from old RFPs that almost fit the current requirement.

13. **RFP review before release** – we will review each RFP for internal consistency and ensure sections C, L, and M are unambiguous, not repetitive or redundant, and clearly define the content and scope required in the proposal.

14. **Proposal page count** – we will allow sufficient page count for bidders to develop their proposals and will avoid asking offerors to respond to every requirement in a 50-page SOW and only give them only 35 pages to provide their response.

15. **Page count** – we will provide page count budgets for appropriate sections of the proposal that ensure enough pages to cover the topics, but not so many pages that evaluators become overburdened reviewing the response.

16. **Fonts and point size** – we recognize that bidders know how to create a proposal that is easy to read and evaluate, so we need not be overly restrictive specifying font, point size, leading, margins, etc.

17. **Redacted proposals** – we will never have bidders provide redacted versions of their proposals for evaluation with the belief that this masks their identity, as it is virtually impossible for bidders to redact their proposals to the extent that their identity cannot be deduced by the evaluation team—especially if one of the bidders is the incumbent contractor where reading their past performance, transition plan, key person, technical approach, etc. will certainly be familiar to knowledgeable evaluators.

We will improve the way we handle bidder questions and strive for better responses.

18. **Thoughtless answers to question** – we will give thoughtful answers to all questions from bidders, and we will ensure that our answers to questions are consistent from one question to the next. We will never answer a question by saying read the RFP.

19. **Timely response to questions** – we will answer questions early in the procurement process and will avoid late answers without giving additional time for bidders to change their proposals. We will avoid responding in the final days with answers to hundreds of questions that change technical requirements, pricing, and evaluation criteria.

We will make it easy for bidders to deliver their proposals on the due date.

20. **Proposal delivery** – we will ensure an appropriate person is available to receive proposals and avoid saying the CO is the only person who can accept proposals unless that person is going to make themselves 100% available on delivery day to answer calls and accept packages in person.

New Member Profile

Lisa Arlt Escoto, Consultant Placement Manager

Company	OST Global Solutions, Inc. (www.ostglobalsolutions.com)
What made you decide to join?	I wanted to enter the proposal profession so I looked on the Internet and found the APMP website. Several friends suggested I join, so I did.
What is your biggest BD/ proposal challenge/issue?	Learning the entire proposal process is a challenge as I have only been in the business for a relatively short while.
How did you originally hear about APMP?	From colleagues who are members—they said it was a great organization.
How long have you been in the BD/proposal field and why do you like the profession?	Although I have been writing more than a decade, I have been in the proposal field since 2009; I enjoy the challenge of learning a new profession and the people I have met through APMP events.
What is your current BD/ proposal role?	After doing some proposal writing, I was recently hired by OST Global Solutions to do business development and place proposal talent with companies who need consulting support.
What do you hope to get out of membership and NCA affiliation?	I hope to continue to learn about proposal development and business development best practices, and to establish a network of colleagues to collaborate and form mutually beneficial relationships.
Fun fact?	I am a published novelist and short story writer, and I was in the Foreign Service for 10 years, with residence in eight countries.

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

New Member Profile

Tina Patterson, Proposal Manager

Company	Worldwide Information Network Systems, Inc. (WINS)
What made you decide to join?	My company recommended that I take the Shipley Associates proposal writing and management workshop. When I registered on their website, it indicated that I could have a $200 discount if I were a member of APMP. I went to the APMP International and APMP-NCA websites and was very impressed by the offerings. I calculated that I could more than pay for my $125 membership if I received the Shipley discount alone. With the other discounts, I found it more than worthwhile to join.
What is your biggest BD/ proposal challenge/issue?	My biggest challenge is to achieve buy-in from proposal contributors on the proposal process. Everyone likes to "do their own thing," but when I tell them that our process is industry best practice, it gives me additional credibility to achieve concurrence.
How did you originally hear about APMP?	I heard about APMP when I was registering for the Shipley course, and it referred me to the APMP website.
How long have you been in the BD/proposal field and why do you like the profession?	I have been a proposal manager for only five months, but my background has been parallel in many ways. Primarily, my career path has been in private sector software product marketing and product management, and in the legal realm, which has included arbitration, negotiation, and mediation. These are all skills that are highly relevant to proposal management, along with strong writing skills.
What is your current BD/ proposal role?	I am the only proposal manager for my company.
What do you hope to get out of membership and NCA affiliation?	My first Roundtable was the one without electricity, and I was very impressed by the people with whom I sat. Many were present or past Board members. They were all very open and welcoming. I expect to develop a strong network of colleagues and would love to find a mentor to help me as I progress as a proposal professional. I also want to sit for Foundation accreditation in the fall.
Fun fact?	I love to cook and recently took a Sur la Table course in Nile Cooking. I also recently purchased my pride and joy—a Kitchen Aid Artisan mixer!

Support Research in Our Field!

The APMP and APMP-NCA have awarded George Washington University a grant to study industry Government business relationships. A key component of the study involves conducting 60 minute interviews with industry leaders and their Federal Government counterparts.

Want to help with the study? Here is how you can add value to the research:

E-mail or call Dr. Elizabeth B. Davis, the principal investigator, with your interest to participate at ebdavis @gwu.edu or 202.994.1870.

Remember to include **your name and contact information** and **the name and contact information of your Federal counterpart.** *(Please be sure to check with your Federal counterpart about their willingness to participate beforehand.)*

Double Up

on education and networking in September!

We're kicking off the fall season with two September events—a new "Knowledge Network" in Columbia, Maryland plus our Roundtable program in Falls Church, Virginia.

Find out how to build an organization that can make the difference between coming in first and second place at our September Knowledge Network:

How to Build a High Performance Proposal Organization

September 8, 2010, 5:30–8:00 p.m.

Doubletree Hotel (formerly Hilton Columbia), Columbia, Maryland

&

Find out how to use Price-To-Win strategies to ensure a healthy portfolio of business opportunities and price them to beat the competition at our September Roundtable:

Using Price-to-Win Strategies to Grow Your Business

September 15, 2010; 5:30–9:00 p.m.

Fairview Park Marriott, Falls Church, Virginia

Come to both the Roundtable and Knowledge Network and get a total of 10 Continuing Education Units (CEUs) toward your APMP Accreditation!

APMP
National Capital Area Chapter

Get complete program details and register now at www.apmpnca.org!

Fun Fact...

Did you know that your benefits should be "sweet and sour"?

We are not talking Chinese food here - although there is plenty of it eaten on proposals. Sweet benefits are what your team brings to the customer - something better, faster, cheaper, or less risky; sour are the ones that point out the problems the customer would encounter if they didn't select you. You need both types to make your proposal persuasive.

Olessia Smotrova-Taylor

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.

Advertising Rates

Page Size	Width x Height	Rate
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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 Eric Schwarz 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.

Special thanks too ...

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