

EXECUTIVE summary

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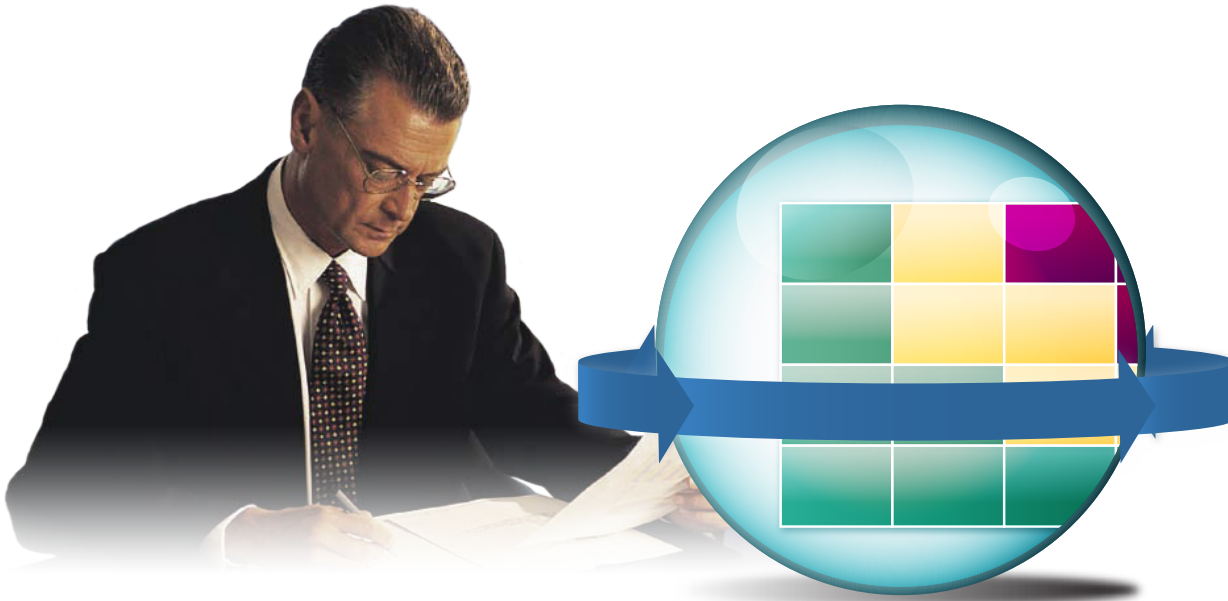
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Risk and Response

by Brenda Crist



One of the most important yet overlooked basics in the proposal life cycle is risk mitigation. If you have ever read Sun Tzu's classic *The Art of War*, you will find much of the book is dedicated to risk identification and mitigation. Sun Tzu explains, "Now the general who wins a battle makes many calculations in his temple before the battle is fought. The general who loses a battle makes but few calculations beforehand."

Having a plan and process for rapidly forecasting risk, assessing your risk exposure, and mitigating risks is fundamental to producing excellent proposals and minimizing the stress involved in producing them. I put risks into two categories: risks affecting your solution and risks affecting your proposal. Sooner than later, if a risk is not fixed in one category it will affect the other category.

Apply Risk Best Practices

The best practices I use for managing

both types of risk are found in the Project Management Institute Project Management Book of Knowledge®, the National Institute of Science, and Technology Special Publication 800-30, and the International Organization of Standards 31000:2009. Most risk standards and guidelines on the market today encourage you to perform a few basic tasks:

- Identify the Risk
- Document the Risk
- Categorize and Prioritize the Risk
- Determine the Risk Cause
- A Plan for Solving the Risk
- Implement the Solution
- Monitor the Impact of the Change

I recommend using this process as a template for avoiding, transferring, mitigating, or even ignoring potential risks in every major phase in the bid life cycle: identification, capture, proposal, production, and post

submission. By applying the template to each bid life cycle phase, you can catch problems early before they have a chance to impact proposal operations downstream.

For example, in the bid identification phase determine if the bid is a strategic fit, if the bid meets your financial objectives, and if money is available to bid the job. Also, determine if you understand the customer's requirements, have obtained customer advocacy for your solution, and if you are sure, your competitors are not offering a better solution at a more reasonable price. Place the risks on a scorecard and rank them in terms of impact and likelihood of occurrence, if you see more negatives than positives, question the practicality of the bid.

Develop a Risk Management Policy

Consider developing a Risk Management Policy for your organization. The policy should define risk mitigation

and escalation procedures and promote accountability by assigning specific roles and responsibilities. The policy should raise the visibility of risks to executives through defined escalation procedures. It should also have built-in accountability gates for increasing the likelihood risks are addressed on schedule. A Risk Management Policy usually defines roles and responsibilities, communications paths, and risk identification and escalation processes. It defines how and when impacts are assessed, how recommendations are made, and the solution approval process. Once solutions are implemented, it describes how risks are monitored and how continuous improvement takes place.

Use Risk Management Tools

Risk management tools can help you improve risk identification and mitigation efficiency. At a minimum, keep a Risk Register to record and track resolution efforts. Other risk management tools include automated collaboration systems, ticket management systems, scorecards, and automated checklists. I like to keep automated risk symptom checklists for every stage in the bid process.

Solutions for Common Risks

Some of the most common risks I face on proposals and my top three mitigation strategies for mitigating them follow.

Risk 1: Insufficient Information about the Client

1. Conduct Internet research on the client, organization, or topic
2. Engage the client in professional forums outside the office like conferences or professional society meetings



Common Risks to Mitigate	
Tight Schedule	Scarce Resources
Insufficient Information about Client	Delusional Executives, Capture Managers, and Colleagues

3. Hire reliable and ethical sources that can provide insight into client objectives

Risk 2: Tight schedules

1. Create a bottoms up schedule – working from the delivery date backwards; and leave a 10 percent margin for error
2. Acquire or hire the resources you need to meet the deadline
3. Ask for an extension, if appropriate

Risk 3: Scarce Resources

1. Set a realistic bid and proposal budget that takes risks and contingencies into consideration
2. Create Plan A for primary resources and a Plan B for backup resources within your organization
3. Interview and screen several consultants in advance to address your potential resource requirements and have them on speed dial

Risk 4: Delusional Executives, Capture Managers, and Colleagues

1. Implement a strong bid /no bid process to weed out the bids that have little chance of winning
2. Implement a Risk Management Policy with efficient escalation paths and executive accountability throughout the bid process

3. Provide sufficient time for proposal production and quality control so proposal errors are resolved and the client receives a high quality proposal

Summary

In summary, think of risks as snow. During the early stages of the bid/proposal lifecycle risks appear as snowflakes – they fall on you lightly and easily melt away. As the bid matures, snow evolves into snowballs that can hit you now and then. By the time you arrive at Red Team, the snow can collect into an avalanche that can bury you if you are not careful. To learn more about Brenda’s risk management strategies and procedures, attend the 2011 International Conference and hear her presentation entitled Risk and Response.

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 Master’s Degree in Public Administration from American University and is ITIL and PPM.APMP certified.

Who's Behind the New Face of APMP?

by Chris Simmons



Rick Harris is the Executive Director and the new face of APMP. He is responsible for leading, planning, selling, and implementing APMP's mission worldwide for a growing membership that now exceeds 4,300 in 68 countries.

I first heard the name Rick Harris at an all-day strategic planning meeting on January 5. We were assessing the maturity level of our National Capital Area (NCA) chapter and taking a fresh look at our achievements and potential with some external association consultants. One of our goals for the upcoming year was to develop a broader and deeper relationship with the parent APMP organization and to “approach the new APMP Executive Director to ... maximize the relationship.” When we heard that Rick was not a proposal professional, but an accomplished and innovative association executive, we collectively felt a renewed sense of enthusiasm. Our ambitious goals and objectives had a good chance of aligning more closely with our APMP parent than ever before. The next step was to meet Rick and welcome him to our group.

It didn't take long before Rick found us. He turned up at our first Speaker Series event on, January 19 (two weeks before his official start date). He quickly followed-up after the event by proposing to meet with us to “learn how [he] could help the NCA Chapter.” We met with him less than two weeks later in downtown



Rick Harris, APMP Executive Director

Birthplace: Jacksonville, FL

Home: Washington, DC

College(s) and Degree(s): University of Central Florida, BA in Radio and Television

Biggest Personal Accomplishment: My children, Riley and Ryder Harris

Favorite Book: “Just Kids” written by Patti Smith about her best friend, the late Robert Mapplethorpe

Favorite Restaurant: Georgia Brown's, Washington, DC

Fun Fact: I am studying Improv and Sketch Comedy

Hobbies: Museums, the Washington Capitals, music (think New Wave and Punk rock shows), independent film.

Washington, DC to share successes, ideas, and concerns.

In addition to being a 23-year trade association veteran (including the Executive Director of the Tech Council of Maryland's MdTech Division), I learned Rick was an innovative visionary and agent for change. Instead of talking about himself, one of his first questions he asked me at a recent lunch was telling. “Chris, what are you getting out of APMP?” My enthusiasm and excitement about the future began to bubble over when he began sharing some of his vision, his leadership approach, and his willingness to collaborate.

This article includes Rick's responses to a wide variety of questions designed to provide some insight into who is behind the new face of APMP and the implications of new APMP leadership for our chapter.

What are your initial impressions of our association?

[RICK] My initial impression of APMP was extremely positive, which is why I was so interested in this position. APMP is a wonderful community of caring, passionate professionals who invest in their industry and truly care about raising its visibility. When you combine

that passion with accreditation that boasts a high completion rate at the Foundation level, the industry's best networking and education and exceptionally affordable dues, you've got an association that is poised for growth. It is rare that you see an association with the kind of infrastructure that APMP has from a volunteer perspective. I was impressed when I first learned about APMP—and in the two months since I started working with the association, I continue to be impressed.

[Chris] How does APMP compare to other associations?

[RICK] APMP has so many of the good qualities found in much larger associations. What sets us apart is how deeply networked its members are with the association. APMP members are the association's heartbeat. I have never seen a more enthusiastic volunteer network in an association, anywhere. The members are engaged in virtually every part of the business.

I want our members to hear what we can do for them. We need to remove business barriers and stimulate thinking that leads to revenue generation. Members aren't interested in what you can't do. They want to know what you can do for them.

There are basically two types of approaches to managing and association. Larger associations tend to manage to avoid risk. Smaller associations, like APMP, can take entrepreneurial risks to grow the business. When you combine an entrepreneurial enterprise with a passionate membership, you have the foundation for significant growth potential. APMP is poised for growth

and significant increases in membership value in years to come.

[Chris] What is your association background and experience? How did APMP originally find you?

[RICK] I've been working in the association field ever since I moved to the Washington, DC area 23 years ago. Before that, I was a radio disc jockey, news reporter, and television reporter for about 11 years and worked most of the media markets in Florida. When I moved to DC, I discovered that knowing how to get stories placed in the media was relevant to association executives who use the press to demonstrate their success to members. I knew what assignment editors wanted in their stories and I could pitch those stories and get positive coverage of the industry.

The National Association of Brick Distributors (NABD) was the first association to hire me. NABD's President Walt Galanty taught me association business practices that I still employ today. The first lesson is to be completely transparent to your staff and members. If someone asks you a question, answer it directly and professionally. If your staff and members know the financial status of the association, and what you are collectively working toward, accomplishing your goals is much more likely.

After working for the National Association of Home Builders (160,000 members and over 800 chapters) for nearly a decade, I went to work for the International Communications Industries Association (ICIA) and for its President Walt Blackwell. He

taught me to plan, work the plan, and think "first class" in everything you do. He also taught me everything I know about running an association with international roots. He taught me how to build and market conferences and trade shows domestically and globally.

I still keep in touch with the two Walts and consider them my mentors. They gave me the foundation and business tools that are helping me lead APMP. They also taught me to run the association like a profitable business because members expect nothing less.

I found out about the APMP Executive Director position in a completely serendipitous way. One of my friends is a proposal manager for one of our member firms. He knew I was involved in the association business and forwarded me the job announcement. I had already heard of APMP and when I read the job posting it had everything else I was looking for, so I applied. And now, four months after applying and going through three rounds interviews, I was offered the position with a February 1 starting date. I have the enviable opportunity to lead this tremendous association. I guess you can say I was referred by a friend.

[Chris] What is your vision for APMP? How much can we grow? Where are the new frontiers for our group?

[RICK] My vision is to build the APMP brand so it is as synonymous to proposal, business development, and capture professionals as the National Association of Home Builders is to builders. There are millions of potential members throughout the

world and we need to make sure they know who we are first. Then we can show them what we offer. Once they know us, we will dazzle them with our member benefits.

By building the APMP brand, getting out there and promoting, we're going to see greater growth in membership, our chapters are going to prosper, and our members are going to benefit. Building the APMP brand will tell everyone in our industry that they have a home, a voice, and a path for personal and professional achievement through their association. It all starts with building our brand.

We've done a good job of creating a great membership base here in the United States. Some chapters are bigger than others, but I look at every chapter as a path to greater membership. Whether a chapter has a thousand members or 100 members, there is always room for more. Our greatest opportunity for expansion in the US is to build on what we already have. We need to collectively brainstorm a growth plan and provide the resources to execute the plan. Member recruitment tools might be different region to region, but the goal is the same – look for potential members wherever they are and introduce them to APMP.

Internationally, there are a number of potential hotbeds where we can establish a market and grow. I'm specifically talking about new markets like India, China, and expanding our reach in Africa, Germany, and other parts of Europe.

APMP has slightly more than 4,300 members right now. I want to create an international membership plan that has 8,000 members in the next three years. When we accomplish

that goal, we'll make a new plan for 10,000 members.

[Chris] What is your leadership style?

[RICK] My leadership style is really built on three guiding principles.

The first is to be fair. If a tough issue needs to be decided, look at it from a 360-degree view without being influenced by the person making the request. If you weigh all the options, look at the potential outcomes. Put fairness first and you'll get to a good decision. It's never failed me. People are reasonable and everyone understands fairness.

The second is transparency. Share it all and let everyone know you're going to share it all. Full transparency is the key to a skilled association professional. Members should know the fiscal health and the direction of their association at all times. When a member is fully informed, they produce better ideas.

The third is to increase new revenue generation. More revenue means more member benefits. I believe you look for new products and services within the association that deliver new value to the member, exhibitor, or sponsor. We have to be creative. I also believe in celebrating the service provider. They pay the freight for the association and fund many of the member benefits through their sponsorship and exhibit dollars. They generally have access to the best market data and are willing to share that expertise. Service providers are invaluable to any association.

[Chris] Why should proposal professionals join APMP (today and in the future)?

[RICK] Because APMP is the center of influence for proposal, business development, and capture professionals globally—period. This is where you need to be if you are in our business.

Our dues are affordable and if you take advantage of our resource-rich association, you will save hundreds of dollars more than you are paying in dues in your first month. We have an excellent accreditation program, the best education and networking programs, and passionate chapter leadership and volunteers.

APMP members will soon find out that we are an association where every idea is entertained and we put the best ideas into motion. You can be a part of that. We want your ideas. We invite you to join our community.

[Chris] If you had to pick your top three initiatives to implement in the next twelve months, what would they be and what results do you expect?

[RICK] I am actually going to change it to four and in no particular order, they would be:

- Growing the membership around the world
- Graduating APMP members from Foundation level accreditation to the Practitioner level
- Expanding APMP's brand
- Building the commercial side of our industry.

[Chris] What advice can you give individual chapters about the best way(s) to grow and retain members?

[RICK] This is a great question and I have thought a lot about it. I have talked to many chapter chairs and for the most part, they all want their

membership numbers to increase. Some are even apologetic for the number of members they have.

I encourage every APMP chapter to embrace their current membership number. Be proud of that number and join with me in a plan to grow your chapter's membership. That short-term growth plan has to start with building a prospect list. We can sign up members when we have an at-the-ready, identifiable, qualified list to market to.

For example, if a chapter has 50 members, embrace it, and make a plan to grow it by 10 percent the next year. That's only five new members a year. When chapters build and work a prospect list with a target growth rate, they inevitably end up with more members than planned.

Retention is a different story. In my mind, the key to membership retention is continually engaging the member as many times as you can throughout the year. We do this through traditional channels like education events, but need to continue thorough consistent e-mails and follow-up telephone calls to see how these members are doing and what they want or need.

There isn't a single chapter that is going to be in this alone. I'll be right there with them to help with measured growth. And we're going to start it all with a member prospect list and celebrate the success. We're going to acknowledge success at every opportunity.

[Chris] What advice can you give individual members in order for them to get more value out of their membership? How

can we help you be successful?

[RICK] The key is getting and staying engaged somewhere in APMP.

It is always interesting for me to learn why people become members of associations. They will tell you everything from wanting to network, advancing their career through accreditation, or sharing best industry practices with peers. The one thing they all have in common is that they are engaged in the association in one way or another.

The most important thing is to pick something within APMP to do. Our staff can help you with that. Get involved in some part of the association and I guarantee that your interests will grow and your dues dollars will be maximized.

If any member is reading this right now and wants to get involved in APMP, but doesn't know where to start, please e-mail me at rick.harris@apmp.org and I'll help you find a place.

[Chris] David Winton was the APMP Executive Director for 18 years. What is your current commitment to APMP?

[RICK] My commitment to APMP is simple. I would like to be here for as long as the Board of Directors will have me. I want to take this association to a new level and when that is accomplished, a new level after that.

APMP has so much potential for growth and I am looking for every idea from every member to help grow their association into everything they want it to be. The key is listening to the members and hearing what they want. It's up to APMP staff to facilitate our member's wants and needs.

[Chris] The majority of proposal professionals around the world have either not heard of APMP or are not members. What can APMP do about that?

[RICK] It just gets down to better branding. APMP has to look at its current outreach campaigns and ramp them up. We have to look at how we are reaching out to our prospects. We do a great job touching current members. We have to build a plan for reaching prospective members. We need to build a national and international prospect list with the help of our members and chapters, design an outreach plan, and execute.

We need a promotional campaign designed to help us attract more members in existing companies and make inroads in companies that don't have any members. When our brand is stronger, our membership will take off.

[Chris] What are your initial impressions of NCA? How do we fit into the overall APMP picture?

[RICK] NCA members account for about 28 percent of APMP's total membership. The NCA is a powerhouse chapter. It has some of the most robust educational offerings, one of the most well attended one-day regional conferences, and the look and feel of a professional and highly competent organization. NCA is an APMP anchor chapter in the U.S. much like the UK Chapter is an APMP anchor chapter in Europe.

I would like to see the NCA mentor smaller chapters to help them realize greater growth. Through its members' experiences, the NCA

chapter could assist other chapters that have been hovering around the same membership levels for a while start to push through. I have seen firsthand how generous NCA is with its information. They have an “all-you-have-to-do-is-ask” mentality and are willing to help everyone.

NCA can help APMP's more modest chapters realize greater success. One way to help is to work with other chapters and share the best practices and lessons learned they have used to capture local market members. Proximity has helped NCA become APMP's biggest chapter, but that just means they have to work harder to retain that member.

I would like to work with NCA on designing a realistic mentorship program to share its best business practices with other chapters who are truly serious about going to the next level.

[Chris] Do you have some ideas for how we might take NCA to the next level? How much can we grow? Where are the new frontiers for our group? Commercial focus? Other?

[RICK] The one real advantage that all of us have in this market is the proximity to the federal government, the contracts that spin out of federal agencies, and the firms who compete for those contracts. That is one of the things I love about the Washington, DC area. There are dozens of federal agencies that will always need our members.

There are really two areas for NCA growth. The first is simple because no matter how hard you work, you'll never capture all the proposal, business development, and capture professionals in this region. When we think about growth, we have to think about where you want to be a year from now and use this year to get there.

NCA has the middle management market locked up. The two untapped markets are the executive C-Levels (CEO, COO, CFO, CIO/CTO, Senior VP, and VP) and young professionals market. I think NCA can address both of these markets with completely different strategies.

The C-Levels are important because they are the decision-makers and invariably want their departments to win. They have a significant stake in making an investment in APMP.

The young professional market is important because they are learning and want to achieve middle manager status and ultimately, executive level status.

Both of these areas are huge growth potentials for very different reasons. One is to bring in the established veterans who will bring in more

middle management professionals. The other is to recruit the future of the industry.

I believe the next frontier for NCA is the expanding the commercial side of the house. Commercial companies are thriving in this area and they are often the service providers who are coincidentally working with APMP's members companies right now. They are the real estate brokers, bankers, accounting pros, law firms and trade associations who each are putting out hundreds of proposals a year to win new work. Because most of the large federal contractors have relocated to Virginia and Suburban Maryland, the lean and mean commercial professionals are right in the heart of DC. We have to expand their offerings and reach out to them to let them know we're here.

APMP needs a solid plan to build its commercial market and I would target Washington, DC as one of the prime target areas in that effort.

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, D.C., area.

Note From the Editor:

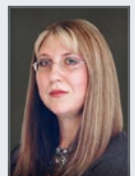
Please take a few minutes and let me know:

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





Ask the Graphics Guru

by Mike Parkinson

How do I get my data to stand out and be remembered?



Data is so very important. It helps prove your assertions.

You say over and over that your solution saves money. But what does that mean to your future clients? A dollar a month? A thousand dollars a day? Is it significant enough for them to invest in your solution and change their current corporate process? They want and expect you to prove your claim, so what is the best way to do this?

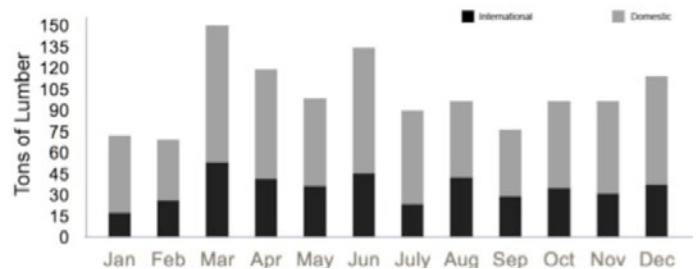
Step one: provide real-world data. One of the simplest ways to sway your audience is to back up your assertions with real numbers. To show how your solution saves money, you could provide a spreadsheet that compares your solution's costs to the current solution based on research conducted by a reputable resource. Unfortunately, spreadsheets can be difficult to digest and are far from memorable and compelling. Look at the following example. Is this the fastest way to analyze data?

	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
Region 1	17	26	53	41	36	45	29	42	29	35	31	37
Region 2	55	43	97	78	62	89	67	54	47	61	65	77

Like you, viewers are often resource-starved and rushed, and they hate sifting through mountains of data to do their job. It is in your best interest, therefore, to make data analysis easy. Though a well-researched spreadsheet of your solution is a perfect first step to support your claim,

we need to turn this data into something your audience can quickly digest, analyze, and remember.

Step two: turn data into a quantitative chart. Consolidate data into bite-size chunks that can be analyzed quickly. You can include your spreadsheets as backup data when applicable. Quantitative charts—like bar charts, area charts, line charts, and pie charts—make it easy to compare data. Many spreadsheet packages allow you to automatically generate charts from your data, helping you better visualize the comparisons between the solutions. (To see more examples of quantitative charts visit <http://www.billiondollargraphics.com/businessgraphiclibrary.html>.) How easy is it to compare the following numbers?



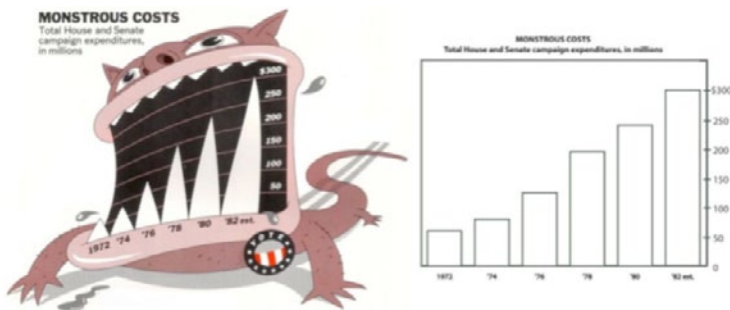
Although much improved over a spreadsheet, a quantitative chart alone is not that memorable. Let's face it. You've seen countless bar charts, area charts, line charts, and pie charts every year. What makes this bar chart stand out from all the others you've seen? It looks like a generic chart rendered in Excel. Would you remember

this chart a day, a week, a year from now? If you are like most people, probably not.

Step three: use visual embellishment.

The Department of Computer Science at the University of Saskatchewan, Saskatoon, conducted an experiment to determine if visual embellishment in information charts was a detractor. (Click on the following to download the study. <http://www.24hrco.com/VisualEmbellishment.pdf>) The study stated, “Guidelines for designing information charts often state that the presentation should reduce ‘chart junk’ – visual embellishments that are not essential to understanding the data. In contrast, some popular chart designers wrap the presented data in detailed and elaborate imagery, raising the questions of whether this imagery is really as detrimental to understanding as has been proposed, and whether the visual embellishment may have other benefits. To investigate these issues, we conducted an experiment that compared embellished charts with plain ones, and measured both interpretation accuracy and long-term recall. We found that people’s accuracy in describing the embellished charts was no worse than for plain charts, and that their recall after a two-to-three-week gap was significantly better.”

The following example, published in the study’s findings, shows a chart developed by Nigel Holmes (below left), a renowned visual communicator, and a plain version. Which drew your attention first? Which is more memorable?



In an interesting twist, Mr. Holmes designed his chart as a personification of the monstrous costs. (See if you remember his chart in a few days. I’m betting that you will.) We don’t always have the creative license to transform data into something as fun as the monster chart, but it is clear that quantitative charts don’t need to follow the plain chart mold to communicate our point. In fact, thinking outside the standard quantitative chart by

using a visual metaphor, simile, analogy, icon, or symbol will grab your audience’s attention and help increase their recollection of your data.

So what kind of embellishment can we use on our chart to make your money-saving assertion really stand out? You could replace the bars with stacks of money, showing money literally piling up from the savings realized by using our solution. You could add callout text that reads “38% cost savings.” Depending on your solution, you can weave your product, or something associated with your product or solution, into the chart. For example, I used wood textures below to show that we are talking about lumber shipments and used different colors of wood to distinguish international from domestic lumber shipments.



Most quantitative charts fail to stand out because they look generic. Using a visually embellished quantitative chart ensures your data stands out, is memorable, and helps you succeed. Challenge yourself to think beyond the standard charts and create something truly unique.

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), BizGraphics On Demand web site (www.BizGraphicsOnDemand.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.



Question: How long have you been in the business of doing business with the federal government?

Dennis Fitzgerald founded 24 Hour Company as a traditional graphic design firm in 1992. Realizing the opportunity to focus on an underserved niche in the Washington, DC area, Dennis transitioned the company into one whose primary clients are business development professionals who bid on government and commercial contract work. To provide a growing client base with unique, new services, the company added three new partners: Mike Parkinson and Paul Kay in 1999, and Colleen Jolly in 2004. Looking for opportunities to expand and better serve the bid and proposal market, 24 Hour Company established a presence in the United Kingdom to serve a broader international community. In 2008 24 Hour Company opened

an office in Kent, which relocated to Central London in 2010.

Question: What successes have you had getting here?

We have continued to grow in staff and revenue during the past 19 years and in 2007 we were honored in the Inc. 5,000 list of fastest growing companies. We are regularly featured in business publications and recognized as experts in visual communications both in the US and UK. Additionally, two of our principals, Colleen and Mike, have been recognized as APMP Fellows (in 2010 and 2008, respectively) for their contributions to the association.

Question: What do you see in your company's future?

We are always looking for ways to better serve the greater business development community and as such continue to develop partnerships in the US and the rest of the world to deliver our unique training services as well as our direct consulting business. Colleen just returned from a trip to Australia and thinks there is opportunity to expand our burgeoning international business, but that might just be the "Foster's" talking.

Question: How long have you been a corporate partner?

We have been involved with the NCA since the mid-90s when Dennis worked on the nascent version of today's e-zine and have been corporate partners since 2003. We have had a staff member on the board since 2005 and in 2010 Colleen became and is still serving as Secretary.

Question: Why did you decide to become a Platinum Partner?

Additionally, we support the International APMP as gold sponsors (since 2002) and believe in having a tiered partner program. Associations live and die not just by their memberships but also by the revenue generated through partnerships. We believe in paying more to support the organization and like the higher level of benefits that come with such support, such as the webinar we conducted in February.

Question: Where do you see this relationship going?

Ultimately, if other companies also recognize the advantage of paying for and receiving greater partner-level benefits then the association can offer more value to membership, which in turn provides us a larger audience to educate and to help. For us it is a win-win and we hope the NCA considers other tiers or possibly expanding the Platinum level – we like be recognized as only one of four, but prefer the association has more



money to keep offering better and better resources!

Question: What changes have you seen that are positive within NCA?

The ever-growing level of professionalism within NCA consistently impresses us. NCA is doing a great job organizing varied events with amazing speakers and putting them in different locations to accommodate the entire Beltway Region. We are very excited to see the new website and think the marketing and constantly pushing high-value information, such as the email blasts, the body of knowledge and the ezine, to membership is the best of any APMP chapter. Every year seems to be better than the last!

Question: What have you seen change-wise in the industry?

We are seeing more awareness and acknowledgement of the power and value of visual communications—that we like very much! We are also seeing a lot of international bids and cross-border collaborations, which provide more opportunities to learn how people in other cultures conduct business. We are consistently trying to improve our services and love meeting new people!

Question: What would you LIKE to see change in the industry?

In an ideal world, we would all have more time to do great proposals and presentations. The government and commercial customers keep truncating timelines and make it

harder to produce high-quality and high-quantity bids. Technology gives us a false sense of how fast things can be done and does not always allow time for people to sleep or do an extra edit-pass. A marathon pace would be great with a few sprints and not the other way around.

Question: How do you see 2012 shaping up?

Like many people around the Beltway, we are not sure what to expect with the anxiety around government shutdowns, budget cutbacks and the 2012 presidential elections. We hope that business will proceed as usual and that we continue to avoid the most serious repercussions of the economy and credit crunch the rest of the country and the world have experienced.



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APMP-NCA Proposal Boot Camp Recap

by Chris Simmons

Over the past four years, the National Capital Area Chapter Proposal Basics Boot Camp has become a premier event for business development and proposal professionals.

The Boot Camp target audience primarily consists of business development and proposal professionals who are either new to the proposal profession or have a new proposal role. However, seasoned industry professionals are increasingly taking advantage of Boot Camp to refresh their skills, meet some of the local corporate partner companies, network with the 300 event attendees, or take away a few golden nuggets of their own. This year's event attracted participants from increasingly diverse job functions, companies, and geographies.

"I've been bringing staff each year to boot camp since 2008. This is the best format and speaker lineup for new proposal [professionals] so far."

-2011 Boot Camp Evaluation Survey

An all-star proposal industry lineup. Boot Camp speakers and special guests represented a virtual who's who of the proposal industry. Rick Harris, the new APMP Managing Director, welcomed



NCA members, and guests with a reminder that NCA is the largest APMP chapter in the world. NCA accounts for 28 percent (1,200+ members) of the total APMP membership of 4,332 (as of April 11). Steve Shipley (Shipley Associates and founding father of APMP) kicked things off with an overview of the business development process and a focus on the proposal preparation and development phases. He led an engaging discussion with active participation from the audience sprinkled with anecdotes and lessons learned from over three decades in the industry. Steve left the audience with a number of free takeaways including a BD Lifecycle Guide, Proposal Development Toolkit, Commercial Proposal Checklist, and BD Lifecycle Chart (7-phases/96-steps).

A high-scoring mix of general and elective sessions.

This year's Boot Camp set new standards for excellence and value. Over 99 percent of Boot Camp attendees would "Recommend Boot Camp to

a Colleague (145 out of 147)." The following evaluation survey quotes say it all:

"The powerpoints as designed serve as excellent resource guides. Excellent professional development opportunity! Well worth the investment!! Excellent capstone Panel Wrap-up!!!" "I've been bringing staff each year to boot camp since 2008. This is the best format and speaker lineup for new proposal [professionals] so far. Very informative and substantive and equally entertaining."



The agenda included four general and six elective sessions. This document highlights the golden nugget take-away points (from the six sessions I attended) that are most useful for those who missed the event.

- Discover the BD Lifecycle (Steve Shipley, Shipley Associates)
- Why do we do what we do? Understanding the theories and formalities behind the procurement process (Shlomo Katz, Brown Rudnick LLP and Judy Robinson, CGI)
- Proposal Pictionary (Mike Parkinson, 24 Hour Company)
- Jump Starting Proposals for Ultimate Success (Olessia Smotrova-Taylor, OST Global Solutions)

- **To Storyboard or not to Storyboard: That is the question** (Chris Simmons, Rainmakerz Consulting LLC)

The 25 Things I Wish I had Known (Harriet Rabenovets, Booz Allen Hamilton; Olessia Smotrova-Taylor, OST Global Solutions; Chris Simmons, Rainmakerz Consulting LLC; Beth Schwartz, TradeWind Energy LLC)



For the record, these are the remaining four elective sessions I missed:

- **Don't Lose Your Job Over This** (Harriet Rabenovets, Booz Allen Hamilton)
- **Introduction to Proposal Coordination** (Joe Salgado, Red Team Consulting LLC)
- **Proposal Writing Basics** (Gary Everett, OCI)
- **APMP Accreditation** (Brenda Crist, Lohfeld Consulting Group)

Just the FAQs. The remainder of this article summarizes my top 20 golden nugget take-away points. These nuggets are based on Boot Camp notes and observations and are organized as answers to frequently

asked questions (FAQs) for easy reference. Special thanks to the Boot Camp presenters of the sessions I attended for the inspiration for these answers.

1. When should I spend my marketing and bid and proposal money? The answer is very surprising. According to an APMP benchmark study (including 60 companies) successful bidders typically spend an average of 57 percent of their marketing and bid and proposal (B&P) budgets before the RFP is released. Twenty-eight percent is spent on proposal preparation, and the remainder is spent on post-proposal submission.

2. How much bid and proposal (B&P) money should I spend? Ten years ago bidders spent up to 5 percent of the contract value on B&P. Today bidders spend between 0.5-1 percent of the contract value on B&P (commercial bids) and 0.75-1.5 percent of the contract value on B&P for Federal proposals. This equates to approximately \$5,000 on a small commercial bid and a \$1 million B&P budget on a \$100 million Federal opportunity.



3. When should I schedule my proposal reviews? Pink Team (Storyboard review) should

“Excellent professional development opportunity. Well worth the investment! Excellent capstone Panel Wrap-up!!”

-2011 Boot Camp Evaluation Survey

be no later than 1/3 of the total schedule (10 days for a one month response window). Red Team (first draft review) should be no later than 2/3 of the total schedule (20 days for a one month response). Pink Team is an important intellectual check to make sure that the writers are going in the right direction. Red Team is the perfect time to bring in outside consultants for objective review and expert recommendations.

4. How much time does it take to write, review, and desktop publish? Writers take between four pages/day for new material and 20-25 pages/day for minimal revisions to existing materials. Red Team reviewers go through 40 pages/day, and desktop publishers – 30-60 pages/day.

5. How do I know how much the government can spend on my bid? In some situations, government budgets are online and searchable, but it depends on the agency. If a program is earmarked, you can see how much Congress has set aside, but you don't necessarily know how much is used already. If the program is not earmarked (general), the information is significantly harder to find.

“Excellent training courses and instructors.”

“Great overview of different topics!”

“Storyboarding was in my opinion the best session I attended.”

-2011 Boot Camp Evaluation Survey

6. How often are protests successful? The number of overall protests is significantly higher in 2010 (2,300) compared to 2,000 in 2009. The sustain rate (when GAO decides in favor of the protesting contractor) increased to 19 percent in 2010. Every year GAO files a report with Congress. See <http://www.gao.gov/special.pubs/bidpro10.pdf> for a copy of the report, including a chart comparing bid protest activity for fiscal years 2006-2010.



7. How important are proposal graphics versus text? Fifty percent of the proposal should ideally be graphics (including focus boxes, tables, pictures, diagrams, flow charts, organization charts, and other visuals). Graphics help evaluators make the quick decisions they seek and go immediately into long-term memory (past the short-term memory

gatekeeper where narratives reside). Winning proposals are the ones that make it easy for the evaluator to like and understand. Proposals with high graphic content and attractive covers score better.

8. What makes a good graphic? Most graphic artists are focused on graphic aesthetics, not content. Graphic conceptualization using PAQS (primary objective, audience, questions, and subject matter) is the key to planning and rendering a graphic. The focus of the graphic should be on both customer benefits and HOW your solution features achieve those benefits. There are four basic visual metaphor frameworks and 57 graphic types (organized into 13 categories). Go to www.BizGraphicsOnDemand.com, www.BillionDollarGraphics.com, or www.24hrco.com for more details on these graphic types and other graphic information.

9. How do I jumpstart my proposal for ultimate success? Follow a nine-step process outlined by OST Global Solutions (www.ostglobalsolutions.com): **1-Build a team; 2-Set the tone from the start; 3-Manage expectations; 4-Get management buy-in; 5-Develop a proposal roadmap and plan; 6- integrate and issue proposal assignments; 7-Educate your team about the opportunity; 8-Train your team; and, 9-Get the ball rolling with a well-prepared Kick-off meeting.** Getting face time with your proposal team and executive sponsors is very important to establish proposal manager’s credibility. It’s much more difficult to ignore the direction of someone you have met in person than a name or a voice on the telephone.



10. What is a storyboard? Storyboards have been used since cavemen drew on walls to tell stories over 30,000 years ago. They were used by Leonardo da Vinci and popularized by Walt Disney in the development of cartoons. The proposal storyboard is a planning tool originally invented by scientists and engineers at Raytheon (formerly Hughes Aircraft) and Lockheed Martin (formerly GE Aerospace then Martin Marietta) in the early 1960s for large complex government proposals. The original storyboard started out as the Sequential Thematic Organization of Publications (STOP) methodology and was documented in a 65-page Hughes Aircraft manual with the same name. Since their inception, proposal storyboards have been shown to have a direct and positive impact on win rates. They are almost universally recommended—but are not always used. They have become controversial in the last 10 years in some proposal circles largely because they have evolved over time from large sheets of paper on a war room wall to a writing/planning tool. The fact remains that storyboards are often misunderstood or mismanaged. Amazingly, some proposal teams go out of their way to disguise the fact that they are using storyboards (like making double chocolate zucchini/ carrot cake to get your kids to eat vegetables). The following three

storyboard templates are the most common in my experience:

- [Proposal Development Worksheet \(Shipleigh Associates\)](#)
- [Module Plan \(SM&A\)](#)
- [Content Plan \(CapturePlanning.com\)](#)

The outline, theme statements (feature/benefit/proof), solutions, and graphics are the key components of all of these storyboard templates. Any time you develop (and review) these components before you write, means that you are using proposal storyboarding techniques as originally envisioned (whether you like them or not).



11. Are storyboards important? Storyboards are critical to achieving higher win rates and higher levels of proposal development efficiency. “Think (and plan) before you write.” Using storyboards and graphics can increase overall writing efficiency by up to 50 percent. Storyboard techniques are essential to increasing bid efficiency (working less) and bid effectiveness (winning more) by increasing the likelihood that proposal narrative and graphics are aligned with the instructions, evaluation criteria, detailed

requirements, customer hot buttons, and competitive intelligence.

12. Do proposal teams need training to be successful?

Yes. Just-in-time training is the most effective way to get proposal teams up to speed. Training is often viewed as the silver bullet to solving the challenge of underperforming teams. If not delivered or reinforced appropriately, training can be a colossal waste of time and money. Use APMP, third party consulting firms, or internal resources to invest in a training program that is right for your company. Customize the training to meet the specific needs of the individual trainees. Set realistic training goals, objectives, and timelines. Think twice before you decide you want to convert SMEs to professional proposal writers. Integrate trainers into your proposal teams to give them first-hand exposure to how things work—or don’t.

13. What’s more important, the proposal development process or developing the right proposal content?

There is generally too much emphasis on proposal processes, and not enough focus on how to develop the right content. Many proposal managers become glorified proposal coordinators who spend too much time on proposal administration and too little time on translating the winning approach into persuasive text and graphics. Just because all the proposal process boxes are checked and the document looks professional, doesn’t mean it is effective in selling a firm’s capabilities. Process is important to make it to the deadline, but it is not what wins the deal.

14. Can proposals be fun?

Too many proposal managers either take themselves too seriously or are focused on administration and glorified babysitting. They forget to look around at all the positive aspects of proposal work like working with highly intelligent people on a routine basis, marking long-lasting friendships and business relationships, using your creativity, and learning new things. Winning proposals saves and creates jobs, and often leads to exciting work that can make a difference in the daily lives of thousands and sometimes millions of people. Winning is always fun and significantly lessens the pain of a challenging bid. Celebrate wins with your team, with your office, and with your company. Send email messages, schedule win meetings or parties, and recognize team members with awards (financial or other) to celebrate success. Take advantage of the opportunity to document lessons learned to make it more fun (and rewarding) the next time.

15. How do I stop my team from making last minute proposal changes?

Learn How to Say “No”! When approached to make last minute changes, resist the urge to immediately agree. Ask if the change will impact the likelihood of winning. Make the impact of the proposed change clear to the requestor. People often aren’t aware of the impact of their changes. Explain how a proposed last minute change will impact your ability to guarantee that the proposal will be compliant, error-free, or completed in time. Most people will understand and the number of last minute changes will decrease.

16. How can I best use subject matter experts?

SMEs are your front line (billable) workers. Resist the temptation to take them completely away from your valued customers. Use them sparingly on tasks where they are positioned to succeed. Define SME proposal roles that strike a balance between leveraging their capability and skills and contributing to the overall proposal development effort. Many SMEs have difficulty writing sales documents. Use them for solution development and storyboarding. Pair them up with proposal writers to increase proposal development efficiency and effectiveness. Don't be afraid to ask SMEs to review your work (informal peer reviews). Provide just-in-time training to your SMEs in valuable proposal skills, such as proposal solution and theme development. Use recording tools and techniques to capture all the information they provide.



17. How much marketing and sales language should I use?

Avoid fluff and arrogant writing. Many proposals are nothing more than a repeat of basic requirements, where “contractor shall” statements are replaced by “we will” statements. Avoid unsubstantiated claims like “world-class” and “uniquely qualified.” Instead of the marketing fluff, base your claims on facts. Explain

how you will satisfy customer requirements and provide the proof (third party proof is best).

18. Should I use color reviews? Color reviews (when done right) are recognized as the most cost-effective ways to improve the quality of the proposal. Yet, color reviews have a reputation for being inefficient, ineffective, and a waste of time for all those involved. Determine color review standards, procedures, roles, and responsibilities up front. Communicate these to the team (in writing) before each review. Customize the framework for the unique needs of each proposal and on the lessons learned from the past. Pick the right team and keep it consistent throughout the proposal.

The number, skill set, and personality types of your review teams are critical to success. Use a manageable number of reviewers to make sure each section/subsection is reviewed thoroughly. Not every reviewer follows directions or otherwise does a good job. If reviewers come unprepared, don't follow directions, can't finish their assigned sections, or are otherwise non-productive or disruptive, consider coaching and/or replacement.

Color team reviewers aren't always right. Don't debate the merits of a color review recommendation with the review team. Determine your color review recovery plan (the recommendations you will implement, the ones you won't, and the ones you're not sure about). Discuss your plan with the capture/proposal/program manager(s) to reach mutual agreement. Map out the timing and next step assignments based on the plan.

19. What are proposal themes and why are they important? Most experts agree that proposal themes are the most effective way to distinguish your proposal from the competition (other than price). Develop a common definition of a proposal theme. A standard definition includes three major components (feature, benefit, and proof). Features are what you are selling to the customer (your solutions to provide customer benefits). Benefits are what the customer really cares about. Proof is substantiation of your features (third party proof is best). Develop themes early and often.

Start with themes in mind before writing begins (storyboarding). This approach will have a significant and dramatic effect on proposal quality and effectiveness. Use a theme development approach that works best for you. A three column (Feature->Benefit->Proof) table is an easy and effective way to capture the major components of a theme statement. Leverage themes for Executive Summary development. Once the themes are developed, the Executive Summary practically writes itself. See www.rainmakerz.biz for more detailed information on proposal themes—what they are and how to develop them.

20. How can I manage my time better and make my team more efficient and effective? Proposal teams don't manage time well for a number of reasons. Planning is a key to successful time management for any activity—including proposal development. Make sure your proposal development process (methodology)

includes competitive intelligence and customer hot buttons (typically found in a capture plan) and a detailed proposal management plan for how you will design develop, and deliver each proposal.

Develop a detailed schedule. Organize the work into small manageable



steps. Don't start out by scheduling work on weekends. Set deadline 'windows' of time versus COB deadlines. Track and manage progress closely. Focus on status and next steps at daily 'stand-up' meetings. Use a tool (Excel is fine) to track the process of each section. Schedule time to talk with team members who miss deadlines or deliver sub-standard work products to understand the circumstances and mutually agree on next steps.

Use meeting time efficiently. Keep interactions short and action-oriented—especially conversations, meetings, and email messages. Keep your communications work-related, productive, and positive. Use the

right communication channels and don't underestimate the value of walking the halls.

Always have an agenda for each meeting and send it out in advance. Start the meeting on time (every time) and pick a time that is most convenient for required meeting participants (I like 10:05am, 2:05pm, or 3:05pm). Save time at the end of each meeting to review the action items and finish earlier than planned.

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, D.C., area.

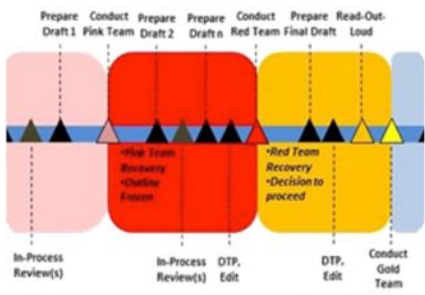
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Some Legal ABCs of the Bid and Proposal Profession

by Shlomo D. Katz



By the time you read this, we will hopefully know the outcome of the “Showdown at Budget Gulch”—whether the government and many of its contractors had to shut their doors in early April because our leaders in Washington failed to pass the appropriations bills necessary to keep the lights on. At least some of you reading this will have had a proposal affected by a shutdown or potential shutdown, either because you were pressured to deliver a proposal early out of fear that the government would lock its doors, you were unable to deliver a proposal during a shutdown, or your company reassigned idle employees to your bid and proposal team during their hiatus from working on their contracts. However this episode has turned out, it does remind us that the proposal business is significantly impacted by the existence of laws that regulate government procurement. What better time, then, to review what some of those laws are and how they affect you as a proposal professional.

The Anti-Deficiency Act is the law that was behind the actual or potential government shutdown, as the case

may be. This law prohibits government employees from spending money without the permission of Congress. In fact, the law makes it a crime to do so. If a government employee went to work during a shutdown and turned on the lights in her office, she could theoretically go to jail for spending money on electricity that Congress has not appropriated for that purpose.

What does this mean to the proposal profession? First, it explains why procurements are frustratingly often delayed because of a lack of funding. Second, it is one of the reasons why there are limitations on the proposals that the government can accept. For example, if the

government has money for one widget, and you propose a truly innovative solution that requires the Government to buy two widgets, the government might not be able to accept your proposal, no matter how much it would like to. In one actual case that comes to mind, the bidder’s proposal required the contracting officer to agree to an open-ended indemnification of the contractor, and the contracting officer did, in fact, agree. Years later, after the contractor had already performed, the government backed out of the deal because the open-ended indemnification was, in effect, a promise to pay money in a future year without an appropriation from Congress for that purpose. The contractor sued to enforce the contract, and lost. As unfair as that may seem, the contractor arguably should have known that contracting officers generally cannot make promises or accept offers that they don’t have the money to pay for.

Another law that might prohibit the government from accepting your innovative two-widget solution is the Competition-in-Contracting Act. This is the law that requires the government to maximize competition for

contracts. Like any law, it has exceptions, and exceptions to the exceptions, and so on, which is why people like me get to stay up nights figuring out if your proposal was given a fair chance. Depending on how the RFP is written, the government may not be giving itself the leeway to accept a solution that does not meet the literal requirements of the statement of work or Sections L or M. In that case, if the government accepts your solution that deviates from the specifications without telling your competitors that they also can deviate from the specs, the government may, in effect, be depriving your competitor of a chance to compete. What can you do to ensure that your innovative solution is accepted? One possibility is to ask a question during the solicitation phase or, better yet, during the draft RFP stage if there is one. Then, when the contracting officer publicly answers your question or amends the RFP, it will put other offerors on notice that the contracting officer is considering innovative solutions. Of course, the trick is to ask the question in such a way that you get a definite enough answer without telegraphing your plans to other bidders.

Another possible solution is to submit a strictly compliant proposal together with an alternate proposal. This will allow the government to decide whether it has the leeway to accept the two-widget solution, but it does not leave you out in the cold if the contracting officer and his lawyers are not feeling adventurous. But, read the RFP carefully! Some of them state plainly that alternate proposals are not permitted.

Finally, a third basic law to remember is the Procurement Integrity Act. This is the law that prohibits the government from slipping you the source selection plan under the table and from telling your competitor about your two-widget solution. It also prohibits you from offering jobs to certain procurement officials and forbids them from asking for a job. People can and do go to jail

for violating this law, including some very high-profile government and contractor officials.

Perhaps because of its serious penalties, many procurement officials are overly cautious about what the Procurement Integrity Act actually prohibits. Some government personnel refuse to speak with contractors' marketing and proposal personnel even when the law permits it. Earlier this year, the Office of Federal Procurement Policy (OFPP) attempted to debunk some of these fears in a memorandum entitled, "Myth-Busting: Addressing Misconceptions to Improve Communication with Industry during the Acquisition Process." Among the misconceptions that were collected by OFPP in actual interviews with procurement personnel were: "We can't meet one-on-one with a potential offeror" and "Industry days and similar events attended by multiple vendors are of low value to industry and the government because industry won't provide useful information in front of competitors, and the government doesn't release new information." All in all, OFPP concluded there should be more, not less, communication between the Government and its contractors, even during the proposal and pre-proposal stages. (A future article will explore these myths and the related truths in greater detail.)

These laws are only the tip of the iceberg when it comes to the legal framework that governs the federal contracting process. As the Showdown at Budget Gulch hopefully has taught us, these laws do affect real people and the jobs that they do.

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, specializing in all aspects of Government contracting. Recently, Shlomo spoke at APMP's Proposal Basics Boot Camp on the topic: "Why Do We Do What We Do? Understanding the Theories and Formalities Behind the Procurement Process." If you have any questions about these or other proposal or contracting issues, please contact Shlomo at 202.536-1753 or skatz@brownrudnick.com

Fun Fact

Most people fell into the proposal profession by accident; a negligibly small percentage planned it as a living all along. Don't believe it? Ask your colleague how they got into this field.

New Member Profile

Stephen (Steve) Canerossi

Company	Canerossi Consulting, Inc
How did you originally hear about APMP?	A colleague, Bill Brigadier of Brigadier Consulting, Inc.
What made you decide to join?	Access to the Body of Knowledge (BoK) and the opportunity to train for and achieve proposal management certification.
What is your current BD/proposal role/responsibility?	Following a 10-year career at IBM Global Business Services – Federal as a Project and Program Manager, with many opportunities as a Proposal Manager, I am now an independent contractor offering proposal and project management services.
What is your biggest BD/proposal challenge/issue?	Leading a blended proposal team of individuals from multiple companies and divisions who have never worked together, and building them into a cohesive, effective, and winning proposal team.
What do you hope to get out of membership and NCA affiliation?	Access to the NCA BoK and the opportunity to network with peers and potential customers.
Fun fact?	I am Italian-American, my family hails from the southern Italian region called Calabria, and my name translates to Red Dog.

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Disclaimer: Don't Read This if You Are Overly Sensitive

On the popular TV show *Mythbusters*, hosts Adam Savage and Jamie Hyneman attempted to disprove the myth that you can't polish poop (Episode 113: End with a Bang; Air Date: November 12, 2008). Using a variety of feces from the local zoo as source material, they tried different techniques in their attempt to buff the spheres to a high finish. After several failures, they found an outside expert who taught them a different approach that eventually worked. The Japanese art of dorodango, a dirt-polishing technique, is considered not just a craft, but a way to focus the mind and spirit, learn patience, and pursue perfection.

As a Proposal Center Manager continuously working on large strategic proposals and competitive task orders, I'm always on the lookout for fresh ways to convey proposal concepts and processes to contributors in an attempt to minimize their reliance upon boilerplate and spark greater creative thinking. In my view, dorodango holds untapped potential for proposal parallels and brings the added benefit of humor along the way.

A quick search on the Web provides several likely sources of information to learn dorodango. The steps are defined, the process can be tedious, and the result can be astonishingly attractive (or a mushy, dull mess). Sounds like a proposal to me!

1. Gather and Prepare Quality Resources. Find a good source of mud, or make your own with ordinary dirt and water. Remove debris (rocks, twigs, leaves, grass, insects, etc.) and sift the dirt to remove clumps.

High-quality proposals require thorough preparations. Identifying, gathering, sifting, organizing, and preparing relevant data during the capture (pre-RFP) stage saves time later and allows the team to spend more time polishing during the proposal stage. Take the time early to define and select the information you will need to respond efficiently to the bid. Consider and collect information internally on past performance, key personnel resumes, and organizational structure (both yours and the customer's). Perform strategic capability gap analyses of your company against the draft SOW, PWS, RFP, and other relevant documents.

Identify potential competitors and teammates. Assess your strengths and weaknesses and begin to fill the gaps with teammates possessing the necessary capabilities. Complementary and overlapping skill sets enable your team to provide full coverage of the anticipated RFP requirements and depth in areas of potential surges.

Organize the data into logical subsets based upon content. Resumes, past performance, management, and other content should be easily grouped and

accessible for consideration, compilation, and delegation in chunks as necessary. Use a consistent structure (template) for the documents to allow parallel assessment of the data at a detailed level. Establish objective criteria for grading the strength of the information for relevance.

Put feelings aside. When pursuing a \$50M contract, have the courage to admit to yourself that a \$30k single task order may not be relevant in the overall scope, complexity, and magnitude evaluation criteria, even if it is the government customer's pet project. If it's absolutely essential to the customer, you should be able to find a way to mention it in the proposal. It just may not be as a stand-alone past performance citation. Sift out the weaker elements for action to improve or discard. If discarding, determine if additional resources need to be collected to fill the gaps.

The Proposal Manager's early engagement in the capture phase can allow the Capture Manager to leverage their strengths and focus attention on the capture. The Proposal Manager effectively manages the collection,



organizing, and clean sharing of relevant content to the Capture Team, and can provide insight to help shape strategy development.

2. Begin Building. Get a good sized glob of mud in your hand, squeeze out the water, and form it into a sphere. Build your proposal on the core framework of a solid compliance matrix developed from submission instructions, evaluation criteria, and work requirements. In my proposal center, the normal practice is to have the Proposal Manager develop the first draft of the compliance matrix and forward it to the desktop publisher, who builds a clean template and embeds the outline structure. This practice has the benefit of separating functions and allows for a second set of eyes on the initial structure of the approach for validation. Once built, grab your previously gathered data and put some of it into the rough outline to see how it initially shapes up. Some adjustment may be necessary to work out some finer details in structure and flow. For us, there usually follows a round of collaboration with the Proposal, Capture, and Program Managers on the structure and template before releasing to the full team for writing.

Add some dry dirt to the outside of the ball and continue shaping it into a sphere. Brainstorming and storyboarding are the equivalent of adding the layers of dirt to the core. Try adding more content to the structure and assess. Does it make sense? Is the response compliant? The customer ordered a shiny sphere; will this blob eventually have the right shape? Will it ever hold a shine? If not, try a different tack.

Allow the sphere some time to dry somewhat, and then pack it solidly with your hands while rubbing the surface to raise a gloss. Pause content development and conduct the Pink Team Review before investing heavily in actual writing. Get external validation of the trajectory of ideas before launching your team into full writing mode. Draft your graphics, charts, and tables to logically present and support your ideas. Select your strongest past performance and resume candidates for submission, basing decisions upon solid, measurable, objective criteria. Brief the Pink Team and process their feedback before proceeding with detailed writing.

3. The Polishing Process. Pat your hands on the ground to pick up powdery dirt, and continue patting and rubbing your sphere. Continue doing this for two hours (yep...I said two hours). This is the essence of the art and craft of dorodango. You'll need persistence and patience to make a finished product, along with practice to develop and refine your technique. Making a shiny ball of dirt is tedious, and it can feel the same way with proposal development. Plan, outline, write, review, revise, and repeat as necessary. Coming out of Pink Team, the Proposal Manager sets the writers loose with assignments, templates, guidance, and



validated storyboards, and continues to work alongside the Capture Manager and Program Manager. During the stages between Pink, Red, and Gold reviews (other colors may be used), managing content development while enforcing genuine internal deadlines is essential to preserve time for the Proposal Manager to perform text polishing. Interim reviews of sections may be needed to monitor or prod the development of content.

The approaching review deadline at first seems so far away and yet accelerates as the time grows shorter. Beyond simple formatting and spell checking, the Proposal Manager has the potential to take the written text from good to great, given enough time. We all know it takes significant time to convert prose from passive to active, name the actors, bring the customer benefits up front in opening sentences of paragraphs, and migrate away from “the contractor shall...We will” empty promise, copy and pasted language from the solicitation.

4. Review and Repeat Cycles. Put the ball in a plastic bag for 3-4 hours. Remove the sphere, and repeat step 3 (above). Replace the ball in a plastic bag for some time. Freeze the documents during each review cycle. In a perfect scenario, writers should stop at the designated pens down time, release their files to the Proposal Manager, and await further instructions post-review. A thorough review by others not engaged in writing proposal content is vital to the polishing process. Review teams should be strategically constructed to provide subject matter expertise, management perspective, compliance focus, and customer viewpoint. Make specific assignments to review

team members in advance. Allow sufficient time for reviewers to digest advance materials (RFP, compliance matrix, storyboards, and review team instructions) before distributing proposal files for review. Pre-brief the reviewers to target their attention to specific areas of the proposal where help is required.

Repeat as necessary. If Red Team was a disaster, consider a second Red Team review before going higher up the management chain. Have the reviewers actively engage with writers to strengthen content instead of simply giving it a bad score and vague rejection. Schedule portions of the document for interim cyclical reviews before the next major milestone to elevate visibility and accelerate development.

5. Final Preparations and Finished Product. Remove the ball again. If it is dry, then take a cloth and polish it to a high shine. Preserve time between the last review and planned production to allow the proposal staff to tweak the documents to the best of their ability. Proofread carefully, verify graphics, and validate the changes well before the delivery deadline. The proposal writers often underestimate the amount of time required to polish the final documents. We know how long it can take just to identify and correct acronyms in a small document—when facing multiple volumes of 50 pages or more, that single task can occupy one person for a significant amount of time. Plan enough time for production and communicate the hard deadlines to the team early. Over the years, I've heard many proposal teams dismiss the production timeline from their planning schedule because in

their minds, all that's left to do is “hit the print button and ship it, how long could that take?”

On a recent proposal, we had a planned production run of over nine hundred pages total for one full set, with 12 sets to produce. Complexities included double-sided color printing, inserting 11 x 17 foldouts within the sections, building a master glossary of terms for all volumes, developing a master table of contents to index the entire proposal, merging multiple attachments coming from various sources and in different file formats and the requirement to provide electronic files with the bound hard copies. Based upon the printer production stated capability, we faced almost six hours of non-stop printing (not including pauses for paper and toner changes, network lag, reprints for various reasons, paper jams, etc.). We backed our production timeline by two extra days to allow for contingencies. We spent every moment of the planned extra time handling late arrival of content and correction of data conflicts (both major and minor) between proposal volumes before full production could occur.

Just like the Mythbusters needed help to succeed, our proposal teams need our expertise and professionalism. When we perform the planning and scheduling before or at RFP release, we should be working backwards from the submission date. Make a hard internal files lockdown date for the proposal staff to buff the documents to a high shine before production and delivery just as rigid as any of the other management review milestones. Set your color reviews back from that lockdown date and resist all attempts to budge.



Summary. After a few proposals, most contributors will adapt to your schedule and resistance will diminish. With practice, the final product of each proposal should improve and you can proudly display your in-house copies in your proposal library as positive examples of the high-quality potential for every bid.

Tim Pepper applies over 18 years of experience in capture, proposal, and program management for the Federal and DoD market. He is a Senior Proposal Manager and Proposal Center Manager for General Dynamics Information Technology in Chesapeake, VA where he leads proposal development (writing, editing, managing and producing) in pursuit and capture of large corporate strategic and tactical bids involving multiple divisions and subcontractors. He holds a Bachelor's Degree in Business Administration/Computer Information Systems from Saint Leo University and is AM.APMP certified.



More Events, More Value for Members!

by Ros Angus

With the new spring blooms and longer days also comes a newly created role on the NCA board—the Networking Chair. Approaching nearly 1,000 members, NCA boasts the largest membership of any individual chapter internationally across APMP. It is more important than ever to ensure that both established and new members continue to derive maximum possible value from their membership. A key goal of the Networking chair role is to increase value to NCA members by providing new varieties and formats of networking events and opportunities, with a particular focus on including the underserved cities in our area. These events will be in addition to the regular, published ‘Speaker Series’ events. Naturally, if we can attract new professionals to sign up along the way, so much the better!

The first event on April 28th in Bethesda, MD, will provide networking and a presentation on selecting the right teaming partners. Eddie Becker, Capture Manager at Dell Services and previous APMP presenter, will provide an overview on source selection-style scoring techniques that attendees can use to create the right team dynamics to pursue their bids.

Watch this space as we vary the scope and format of future events! We’re talking breakfast, lunch, afternoon, evening, or even virtual events across various locations. Future events may be broad in scope, or may cater to specific special interests, such as healthcare and small businesses. Some may even be co-hosted with other groups and associations where the respective attendees would share mutual interests.

Ideas for new events are very welcome. Additionally, if anyone would like to contribute their time and ideas by joining the Network Committee, contact me directly at ros@apmpnca.org.

APMP-NCA Upcoming Events

Connect with people and build your professional knowledge and skills at these APMP-NCA and national events!

May 19

Speaker Series

U.S. Representative Gerald E. Connolly
(11th District of VA)

Fairview Marriott Hotel, Falls Church, VA

May 31-June 3

APMP International Conference & Exhibits

Sheraton Hotel, Denver, Colorado

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Ros Angus serves as Director of Business Development with Proposal Development Consultants, LLC. She has more than 12 years' combined executive search and contingent staffing and management experience, advising Fortune 500 companies and federal government contractors to provide tailored human capital solutions. She is actively involved with APMP and served most recently as a member on the 2010 and 2011 Boot Camp planning committee.

Recap: March Speaker Series'

by Hélène Courard



On March 16, Mr. Theodore A. Holloman, Deputy District Director for the Small Business Administration's Washington Metropolitan Area District Office, provided an overview of the recent modifications and guidance handed down to the SBA for government procurements and shared his perspective on the current climate for small and other-than-small business partnerships in today's acquisitions climate.

Mr. Holloman began by providing an overview of the key findings of the Interagency Task Force on Small Business Federal Contracting—such as the need to provide clear guidance on when and how set-asides and related procurement tools should be used, and that agencies should be more accountable for SB goal achievement. Mr. Holloman also provided significant insight into the results of the Small Business Jobs Act from September 2010 that brought acquisition implications for large and small firms; the new 8(m) program for women-owned small businesses; and recent modifications to the 8(a) Program.

Following his overview he sat down for a Q&A session led by Hélène Courard, Chair of the Speaker Series Committee where he provided his perspective on insourcing (he believes is a red herring), resources for partnering (recommends the Sub-Net database: <http://www.sba.gov/content/sub-net>: database primes can go there to post a need for a sub; and

the CCR – Dynamic Small Business Search— http://dsbs.sba.gov/dsbs/search/dsp_dsbs.cfm: a tool for mid and large firms to identify qualified SBs); and monitoring compliance of large firms in meeting small business goals (most enforcement starts with tips from industry).

Hope you have joined us on Thursday May 19, back at the Fairview Park Marriott when Congressman Gerry Connolly of Virginia's 11th District will discuss how he balances advocating for federal workers while supporting local contractor firm's needs. We will provide a recap of that session in the next e-zine.

Hélène is an active member of the Association of Proposal Management Professionals (APMP), National Capital Area (NCA) Chapter Speaker Series Committee (2008-2010) and has attained her Foundational Accreditation with APMP. She also served on the Board during the 2010 year as the chair of the Speaker Series Planning Committee. Hélène has a bachelor's degree from Saint Joseph's University and a law degree from Santa Clara University School of Law.

Fun Fact

They have square watermelons in Japan—they stack better. (sometimes you have to give the government something they did not know they needed).





Are Win Rates Valuable?

by Chris Simmons

(Part 2): Making Win Rate Metrics Work for You

In Part 1 of this series we questioned the value of the skyrocketing win rate as a meaningful marketing metric. Part 2 takes a more in-depth look at win rates and how these metrics can be used to serve as a valuable measuring stick for business success.

A metric (in business terms) is a standard of measurement typically used to assess efficiency, performance, progress, or quality. The win rate standard may be applied to a plan, a process, or a product. For proposal professionals win rates typically apply to the business development process or the success of proposals over time.

Win rates used for external marketing and sales promotion have become meaningless—largely because they are difficult to standardize and impossible to compare across companies. However, when used internally, win rates can be an effective tool for measuring the efficiency and effectiveness of capture management and proposal development processes. So how can the win rate metric be used to measure internal success?

Win rate variables

The business environment is too complex for a single win rate metric to represent the performance of a company, a business unit, or even a proposal center in a meaningful way. Consider the following variables that all have a significant effect on win rate calculations.

Emerging growth markets vs. mature declining markets. Growth industries have a larger, more diverse group of bidders (two to three market leaders, a number of emerging tier-2 challengers, and even more new niche entrants). Since the number of growth industry

bidders is high, win rates for these industries are statistically lower. Declining markets, on the other hand, include more predictable commodity-based product and service offerings and usually produce no more than two to three bidders. Companies that serve either multiple industries or industries where market maturity varies significantly within an industry should track win rates for each market segment.

Large bids vs. small bids. The size of the opportunity your company pursues will directly and significantly influence your win rates. In general, the larger the opportunity, the smaller the number of qualified bidders and the higher the win rate. Very large single-award opportunities (>\$1 billion) typically have no more than two to four bidders and thus, higher win rates. Smaller opportunities (<\$1 million) can have scores of bidders that have the same or similar solutions and value propositions. Companies that target and propose bids that vary significantly in size should track win rates by bid size category.

The business environment is too complex for a single win rate metric to represent performance in a meaningful way”

Large IDIQ, blanket purchase agreements, or other multiple award vehicles that merely qualify your company to bid on future task orders are another story altogether. These pursuits almost always include large numbers of bidders and no immediate revenue (until future task orders are tendered to awardees). Tracking win rates for these large, non-revenue producing opportunities is important. And, it definitely requires a separate set of win rate metrics.

Incumbent bidders vs. new entrant bidders. No one is better positioned to win a re-compete contract

than the incumbent bidder. Incumbents have in-depth knowledge and understanding of customer hot buttons, baseline solutions, risks and mitigation strategies, and potential areas for improvement and innovation. Win rates for incumbent contractors are higher than any other win rate category.

New entrant bidders are either: 1) betting that they can unseat the incumbent (because the bid is in their sweet spot) or, 2) making a strategic decision to pursue a low probability bid. Win rates for these new entrant bidders can be significantly lower than for incumbent bidders—especially if the new entrant lacks the budget or the resources to invest in the bid.

Unseating the incumbent usually requires a rigorous bid/no-bid process and additional investments in the capture and proposal development processes to ensure high levels of customer focus and to create a compliant and compelling proposal.

Low probability bids are a necessary evil for new entrants to make a lasting first impression with a new prospect. They can also serve as a vehicle for developing competencies in a new area. Some new entrant bidders submit proposals outside their strategic plan. But submitting a bid on every opportunity (“shotgun bidding”) with little or no qualification yields predictably low win rates.

Win rates for incumbent, new entrant, and shotgun bidding can vary greatly and should be tracked separately.

Must win (unlimited resources) vs. make do (resource constrained). Although many companies will state that a bid is a “must win,” few have the resources required to virtually guarantee a win. Most bids are resource constrained due to limited knowledge of the customer, lack of sufficient subject matter expertise, competing priorities, insufficient bid and proposal budgets, or other factors. All things being equal, the larger the investment an organization makes (from identifying opportunities to best-and-final offers), the higher the probability of winning the deal.

Must-win proposals should be customer focused, responsive, innovative, artful, inspiring, easy to read, and easy to evaluate. “Make-do” proposals are often internally focused,

non-compliant, self-absorbed, uninspiring, hard to read, and hard to evaluate. As a rule, make-do proposals use more boilerplate and, as a result, are less likely to win.

Consider rating proposals along the must-win/make-do continuum to develop a high-level classification of the resources invested. Take it one step further and develop a standardized (and more sophisticated) approach to assessing your estimated win probability at proposal submission. Track your actual bid and proposal costs (both internal and external) to determine a return on investment (ROI) for each bid.

Tracking win rates against estimated win probability and ROI provides significant insight into actual performance. It can also prove the validity and value of your current bid/no-bid decision-making and other proposal processes.

Competitive price-to-win (PTW) vs. internal cost plus pricing. Most proposal professionals agree that price trumps all other proposal evaluation factors. In fact, some pricing experts assert that more than 80 percent of awards are made to the lowest priced and technically acceptable bidder. As a result, bidding companies that invest more heavily in strategic PTW analysis that includes target customer budget, competitive pricing intelligence, high-probability competitor solutions, and other factors are statistically more likely to win.

Companies that base their pricing on internal cost plus pricing techniques using tactical bottom-up level of effort estimates usually come in second. Tracking win rates for competitive PTW versus other pricing techniques is likely to yield some interesting results and potentially have a significant effect on future bidding strategy and win rates.

You can't win them all....and you shouldn't!

It may come as a surprise, but higher win rates aren't necessarily better. The target win rate for your company depends on a number of variables. These variables will change over time as markets evolve, competition adapts, and the strategic positioning and product and service offerings of your company become more sophisticated. Establishing win rates that take these variables into account will help you strike a balance between the bids you pursue and the bids you win.

So instead of focusing on a bogus win rate for marketing purposes, establish a meaningful set of internal baseline and performance metrics that are closely aligned with your business. Establish rules for consistent win rate metric calculations and adhere to strict audit procedures at every step. Set realistic goals for improvement and re-evaluate these goals often. Combine this discipline with a lessons-learned debriefing on every opportunity (win or lose) and win rate metrics are guaranteed to work 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, D.C., 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 call 202-255-2355. Visit www.rainmakerz.biz.



Parenting and Proposal Parallels

by Alex Brown

“My life revolves around my girls” is a mantra I adhere to.

Each morning I wake up happy that I have another chance to enrich their lives while praying not to screw up like I did yesterday. I have to explain repeatedly why the golden arches are not a place where we go often, even if it is cheap and those fries are delicious. I also try to stop them from watching too much TV because my parents drilled into my head that it would rot the brain. Each day I worry about what they may see, experience, and, most importantly, remember. I see on a daily basis the impact of persuasive marketing on them, from the animated characters that present themselves on cereal boxes at our breakfast table to the likenesses of TV personalities on clothes and books. My kids are absorbing hundreds of messages daily.

Oddly, through the princesses and tween singing sensations I see

multiple basic, but true and positive business lessons that my girls are learning that can also apply to proposals. Here are a few:

1. Image matters. You might have the tastiest chocolate in the world inside, but if the wrapper does not catch the eye of the child, they will pay it no mind. This explains why the zero bar doesn't sell more, but that's just my opinion. When preparing a proposal, remember that we are trying to reach individuals, and not agencies in general. The evaluators have a mountain of proposals to read in a finite amount of time. Their attention span is small, so you have to write like a news story, to cover a subject quickly and with glitz. In proposals, an attractive cover and graphics on nearly every page are our saviors by attracting the attention of the reviewer and delivering messages better than pages and pages of

text. Your superior solutions may go unnoticed if they are not persuasive and do not captivate the reviewers, so you have less of a chance to win.

2 Brand recognition starts early. My 6-year-old, who has never been to the “Magic Kingdom,” not only knows of it, she knows where every ride is in it. This is a lesson every business developer needs to keep in mind, or should I say, imprint in mind (as in the mind of the COTR). To become more than just another company positioning itself to win business, you must ingratiate your brand, your offering, and your capabilities so they not only take your call, but place a call to you when an opportunity is a mere idea. You can win on occasion without it, as people have won the lottery, but to be consistently successful, you have to be in the ears (phone), eyes (face-to-face or email), and thoughts (trusted advisor)



Real Life Translates to Business Matters

of the decision makers at the agency you want to do business with.

3. Word of mouth influences decisions. “Did you see what Phineas and Ferb did yesterday?” is a conversation I hear daily when I drop off my kids at school. Who knows what else they discuss at lunch or recess. What people say about your solutions and how your company performs on a contract gets out, so make sure they are saying good things and not the bad. Train your personnel on site or those that work closely with the customer to present the image you want repeated.

4. Jingles and catch phrases are forever stuck in our heads. “Two all-beef patties, special sauce...” Everyone knows the rest of the words. I hear my youngest singing under her breath constantly: “I’ve got the best of both worlds...”

(FYI, thank you very much Hannah Montana, because now I’m singing it for the rest of the day!) On a proposal, the right win theme will resonate with the reviewers and they **WILL** remember when you write persuasively. All major (and even some minor) sections needs to carry the theme. Without it, the sections will not flow and complement each other. Since it is likely that multiple reviewers will read your proposal, you want each of them to remember a consistent message.

I consider myself lucky because through my girls, I am exposed to the constant bombardment of advertising, marketing, and sales blitzes I wouldn’t otherwise be exposed to. I get to see what catches their eye, and tickles their fancy. As a business development professional, I get to use these lessons and apply them to the

world of proposals. We are shown daily what sells. Remember to apply what works. Sometimes we do not have to reinvent the wheel to win.

Because of OST Global Solutions growth, Alex was brought on to develop new lines of business; Business Development (Direct BD services for clients) and multiple classroom Training programs (from Capture to Writing). Alex’s experience growing companies, and as a skilled relationship builder, allows him to use his extensive personal and professional network in the federal arena for success with OST. He currently holds a board position with the NCA chapter of APMP and knows he can bring the same success he has brought to both the Corporate Partner and Network groups. Prior to his work at OST Global Solutions, he supported Proposal Development Consultants as a Relationship Manager for consultants and federal contractors in the metro DC area. In addition, at VediorNA and Ingenta, he worked both in Business Development and in Information Architecture/Project Management, servicing Fortune 500 clients in the Boston metro area.

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APMP-NCA Board of Directors Meetings are Open to Members

The Board of Directors for APMP-NCA meets the first Tuesday of every month. Every other meeting is a virtual meeting via a telephone conference. These meetings are open, and APMP members may attend.

Special thanks too...

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