



EXECUTIVE summary

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This Issue's Theme: **Oral Presentations**

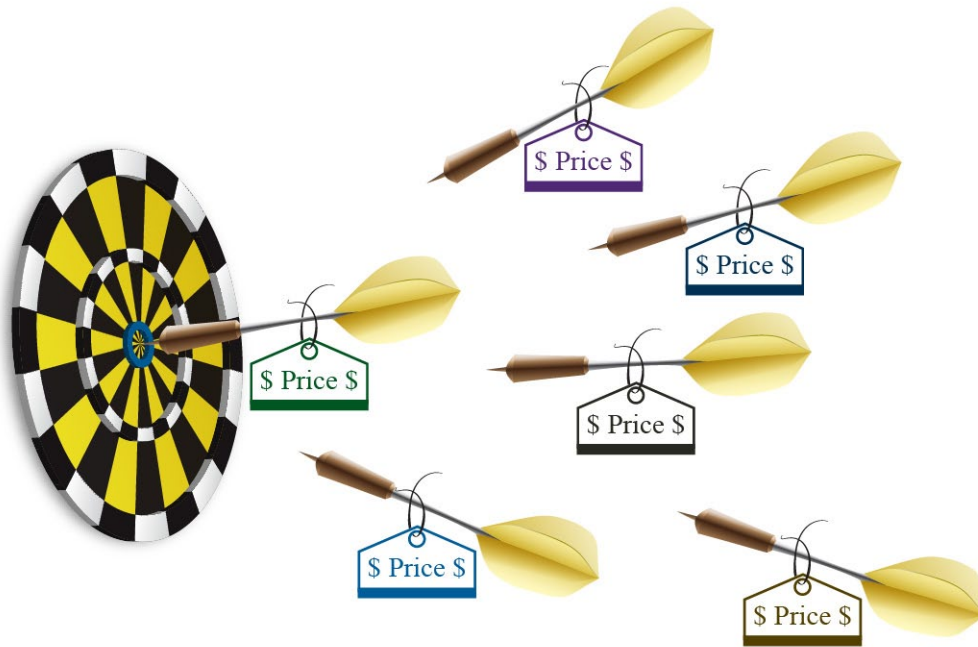
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Making Bids More Competitive in a Hypercompetitive Market

by Brenda Crist



The theme of this eZine is Oral Presentations. The eZine is filled with terrific articles from experts in the field. To get your oral presentation team in front of the customer, you must have a solid business proposal.

We are facing a hypercompetitive market, and Government and industry are trying to do more with less, increase productivity, and balance budgets. Our economy has shown marginal signs of improvement over the past two years; however, government spending has ballooned and citizens are calling for government to get a grip on spending.

Evidence of this scenario has been demonstrated by more awards going to the low-cost bidder and questions concerning how the low-cost bidder arrived at their bid price and the viability of proposed solutions.

To determine how to formulate more competitive bids, I turned to pricing gurus, Tony Constable of CAI/SISCO, Randy Richter of Richter & Company, and Bob Lohfeld of the Lohfeld Consulting Group.

Tony Constable's pioneering firm, CAI/SISCO, has assisted prominent domestic and international clients win more than 1,350 major competitions in the aerospace, military, telecommunications, and IT fields for over 30 years. These opportunities, with an aggregate value in excess of \$1T, have involved all branches of government and most technologies. Tony is also an educator and author. He has written scores of articles and is in the process of publishing two books this year: the first is on the concept of *InfoCentricity*; the second, *Hope Is Not A Winning Strategy... But Price To Win Is*, is the first "How To" text devoted to Price To Win (PTW). Tony also devised

CAI/SISCO's highly acclaimed PTW framework and the first publicly available PTW training seminar among other business development seminars that his firm presents.

Randy Richter is President of Richter & Company, a leading provider of Price To Win and Competitive Assessment support to Washington Technology Top 100 companies. His knowledge and experience – combined with outstanding analytical and presentation skills and an overwhelming "can do" attitude – help clients win in today's highly competitive domestic and overseas markets. He has been a featured speaker at Federal conferences, industry association events, and technical meetings, including presentations at both the APMP International Conference and APMP National Capital Area Mid-Atlantic Proposal Conferences.

Bob Lohfeld serves as CEO and general manager of Lohfeld Consulting Group. He has more than 30 years' experience winning contracts in the government market and is recognized consistently for leadership in business development, capture management, and winning proposals development. He teaches Capture Management, and writes the Capture Management column in Washington Technology magazine. Prior to forming Lohfeld Consulting Group, Bob served as Division President at Lockheed Martin, Vice President of Lockheed Martin Information Technology, and Senior Vice President at OAO Corp.

1. Is industry changing the way it is formulating its bid price in this hypercompetitive market?

Tony: Yes. The contracting community is recognizing that price is significantly more important than any other aspect of a bid and is reallocating pursuit resources to address issues like competitive analysis, price to win (PTW), and strategic pricing. As a case in point, the brutal truth from a current U.S. Army RFP is this: "As a basis for award, trade-offs between cost and non-cost factors are not permitted. Award will be made on the basis of the lowest evaluated price of proposals meeting or exceeding the acceptability standards for non-cost factors." Be warned!

Randy: Yes. Bidders are becoming more aggressive on pricing, looking for ways to cut costs, and in many cases, cutting margin to the bone. But the real change goes beyond bid pricing. Companies are bidding more desperately, going after opportunities that they would have ignored a few years ago to ensure that revenues continue to grow. While this shotgun

approach is great for the proposal-writing industry, ultimately it's not great for the Government or the bidder: the risk (and reality) of poor performance is increasing.

Bob: Yes and No. Best Value is still the predominant award criteria in our highly competitive market and companies work hard to bring innovation to their solutions in order to increase their technical scores. When this fails to separate competitors, price becomes the determining factor. Consequently, price must be part of the win strategy, but it is not the entire win strategy.

2. Have you seen industry reducing overhead to increase competitiveness, if so how?

Tony: Major companies are engaged in what amounts to "open season" on middle management overhead. Also, to gain the greatest possible flexibility and stymie competitor insight into their most likely bid pricing postures, major companies are "hiding" their cost pools behind meta division organization structures or internal joint ventures.

Randy: Absolutely. It's not a good time to be in an indirect labor position; look at the number of managers and executives from major integrators being offered buyouts (or worse, simply shown the door).

Bob: There has always been downward pressure on overhead costs and indirect rates. We continue to see companies cutting these rates to win and then arguing that indirect cost overruns can be offset with increased sales. Sometimes this works, and sometimes it doesn't. When it works, it is a great strategy and when it fails, it erodes profit margins and can have negative long-term effects.

"Stay away from historical pricing – your bid price must be future-facing"

3. What are the best open sources for collecting competitive intelligence for pricing bids?

Tony: Assuming you already know how to creatively "game" bid prices, then become a student of your industry, talk to people and understand the strategies behind as many winning bids as possible. Stay away from historical pricing and wrap rate data – your bid price and those of your competitors must be future-facing. If you still feel uncertain, or your bid is a "must win," get a second opinion. My PTW book includes an exhaustive list of "open source" competitive intelligence sources – please email me at tconstable@caisisco.com for a copy of the list.

Randy: There is no "best source." Success requires a wealth of sources, a process for effectively gathering data, and time to do it well. We use a combination of primary and secondary research in our efforts. This enables us to accurately project how historical results (from FOIA'd documents and commercial databases, for example) will change based on the current environment and specific opportunity requirements. It's more about dedication (and perspiration) than inspiration!

Bob: Open source information is everywhere and you just have to be

“Open source information is everywhere... You will be amazed at what you can find out.”

diligent in looking for it. If you know what you are looking for, you will be amazed at what you can find out. It’s always interesting to add “street talk” to the data collection effort. People will tell you whatever they have heard, but you still have to validate the information so you know you have it right.

4. Have you seen an increased willingness to raise technical risk in favor of a more cost competitive bid?

Tony: Since price is now the major determinant for making an award within a group of qualified bidders, proposed solutions need to fit within a winning price envelope. Technical solution risk probably increases as bidders propose lower cost solutions with which they lack familiarity.

Randy: Yes, but the Government is pushing back. To use this strategy successfully, a bidder must identify risk and clearly define how it will be managed post-award to avoid receiving low evaluation marks and gross adjustments in most probable cost assessments.

Bob: This is a tricky one because risk is translated into a weakness or a deficiency in scoring federal proposals and it only takes a few of these and your proposal is out of the game. Creative

thinking should be encouraged to raise technical scores, but good engineering should be used to mitigate the risk. It is always a trade off.

5. What advice do you have for formulating a “technically acceptable” bid?

Tony: It is pointless fashioning a “technically acceptable” solution that cannot be priced to win. Determine what the winning price target has to be first (e.g., with an “early” PTW study). Then fashion your solution to price at, or below, the overall price target.

Randy: First, make sure your bid is compliant. More bids are being received for every opportunity than ever before, and noncompliance provides evaluators a simple way to eliminate a bidder and therefore reduce their overall workload. Second, work to keep your price low, but don’t automatically eliminate extra value. Evaluators are human; when faced with an “acceptable/unacceptable” decision they will give the benefit of the doubt to bidders who demonstrate genuine understanding of their problem and offer a real solution. Look beyond the words in the RFP; understand what is driving the requirements to identify ways of offering additional value without increased cost.

Bob: A bid is technically acceptable when it meets the contractual requirements set out in the solicitation. If this is the strategy you chose, be careful not to include any features in your offer that increase your cost. When the government awards to a technically acceptable offeror, it will always be to the lowest priced, technically acceptable offeror.

6. If a customer published its acceptable bid range, say \$10M-\$12M, what advice would you give your clients in formulating a bid?

Tony: Target 80%, or less, of the addressable budget and develop a post-award plan to make it work.

Randy: I’m a cynic, so I’d assume that most bidders would aim for the low end of the range, and some would drop below to try and buy the deal. I would counsel my client to review the opportunity against their business goals to see if bidding even makes sense – and if it did, to create an aggressively priced bid that includes true non-price discriminators.

Bob: The government often publishes a price range when the RFP has inadequate information upon which to accurately size the contract effort or predict the contract price. Don’t go over the range or under the range. Most everyone will hug the lower limit of the range and try to show they will deliver more value than other competitors.

7. What recommendations do you have for incumbents who have done a great job but risk losing the next round on price?

Tony: Don’t walk into the pricing future backwards. Turn around and face forward reality – that’s what an insurgent has to do.

Randy: Unfortunately, there’s not much to be done at this point but drop the price. But I’m a firm believer that bidders lose most deals because they fail to prove the benefit of their solution to the customer in earlier rounds, allowing competitors to turn

the opportunity into a price shoot-out. To avoid this situation, bidders need to start their pursuit early, develop and execute a clear action plan for shaping the opportunity based on thorough understanding of customer needs and desires and likely competitor capabilities, and “show their work” in a logical fashion within their bid.

Bob: Every incumbent must understand that when they do a great job for the client, their price is the only area of the bid that a non-incumbent can attack. The strategy for the incumbent is to deliver the same service quality at a lower cost. If an incumbent offers to deliver the same service at its present costs, the incumbent will lose 50% of the time.

8. Has the diminished quality of solicitation documents over the past decade affected how you calculate your bid price?

Tony: As more agencies adopt shorter contract durations (the OMB recommendation is 3 years), there will be more frequent solicitations with lower values. Of necessity, these solicitations will receive less scrutiny from government acquisition types. The bottom line is likely to be that quality of both solicitations and proposals is likely to slide.

Randy: Yes. We identify how the pre-award evaluated price will differ from the post-award performance price to help clients understand how to create a bid that wins and meets their own business goals. Poor solicitation documents – with conflicting requirements, unclear pricing instructions, and

vague evaluation processes – make this more challenging. Unfortunately, we’re just seeing the tip of the iceberg now. The graying of the Government contracting force, decreasing use of acquisition support contractors, and the drive to cut Government spending (coupled with continuing budget battles in Congress) is going to make the problem worse over the next few years.

Bob: The part of the proposal that the government understands least is the cost proposal and generally the people evaluating cost proposals don’t understand the needs of the people who evaluate the technical and management proposals. We counsel our clients to include additional explanatory information in their cost proposals to bring out their value proposition in their cost proposal, not just their technical and management books. A better explanation can help justify awards to other than the lowest priced offeror.

9. What advice can you give firms in hoping to maintain an adequate profit margin in a hypercompetitive market?

Tony: Three things, in addition to the aggressive solutioning addressed above: 1) Price your bids to win by determining the price that will be needed to win first, not last; 2) Leave no stone unturned in developing and implementing a pricing strategy that avoids blanket assumptions and squeezes costs; and 3) Manage aggressively to your price by constantly chipping away at your cost basis during contract execution.

Randy: Looking at our many successful clients, we see one clear best practice: using “no” as the default decision in gate reviews. This practice forces capture teams to prove why winning a program makes real business sense, and helps assure that ever-more-scarce B&P dollars are spent wisely.

Bob: Don’t become a commodity bidder. If you want higher margins, improve your service and your solution and use some of the money you make to invest in bright, creative people who will continually keep you ahead of the competition.

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.



What are the biggest proposal presentation pitfalls, and how do I avoid them?

Government and commercial oral proposals frequently fall prey to three critical errors:

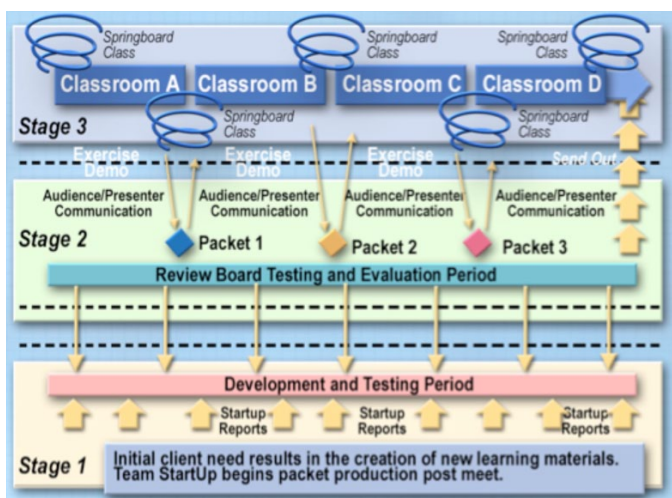
1. Razzle-Dazzle. A proposal that relies on razzle-dazzle techniques fail to reach its audience, because the slides are too complex to follow and remember. The presentation lacks clear explanation. Razzle-dazzle oral proposals confuse the audience with fancy pictures, mountains of data, and overly technical slides. By using so many elements, the presenter hopes that something sticks with the audience. Presenters often use this trick to dazzle the audience into believing that since their solution is complex, it must be better than other, simpler solutions. This approach often backfires.

2. Me Disease. The story, slides, and presentation are not customer-focused. The presenter explains why their company and solution are wonderful but fails to show the benefits and discriminators to their audience. Nothing stands out to the customer, who wants to understand how your solution can help **them**.

Company Overview THE HENDLEBURG CO. INTERNATIONAL

- We are the #1 provider in the United States
- Our staff is well trained
- We have multiple convenient locations
- 1600 cleared personnel
- 132 languages spoken
- We have the best reputation

3. Fact-itis. The presenter assumes facts alone sell solutions. The slides and presentations are word and data-heavy with few, if any, stories and graphics. The problem? *Humans are not robots.* We cannot sift through and disseminate columns of data in seconds. We make decisions based on both cognitive and emotional factors. Data reaches us on a cognitive level; however, slides of numbers and text do not



reach us emotionally—and every decision is guided by an emotional response. This is confirmed by countless studies. Google it. If you don't tell a story with your data or display it in a compelling, memorable way, then you will experience low win rates. Empathize with your audience. In turn, they will empathize with your solution.

But how can you avoid these pitfalls? The following are three steps that eliminate Razzle Dazzle, Me Disease, and Fact-itis.

24 Month Contracts					36 Month Contracts						
Model	Monthly Cost	Phase Cost	minutess/years	3G Data	TCD	Model	Monthly Cost	Phase Cost	minutess/years	3G Data	TCD
Q2 16GB	\$38	\$20	100/unlimited	500MB	\$199	Q2 16GB	\$38	\$20	100/unlimited	500MB	\$199
	\$30	\$179	300/unlimited	500MB	\$899		\$30	\$179	300/unlimited	500MB	\$899
	\$40	\$119	600/unlimited	500MB	\$599		\$40	\$119	600/unlimited	500MB	\$599
	\$40	\$99	900/unlimited	500MB	\$599		\$40	\$99	900/unlimited	500MB	\$599
	\$50	\$29	1200/unlimited	750MB	\$529		\$50	\$29	1200/unlimited	750MB	\$529
	\$50	\$0	both unlimited	1GB	\$1179		\$50	\$0	both unlimited	1GB	\$1179
Q2 32GB	\$50	\$29	100/unlimited	500MB	\$579	Q2 32GB	\$50	\$29	100/unlimited	500MB	\$579
	\$35	\$279	300/unlimited	500MB	\$999		\$35	\$279	300/unlimited	500MB	\$999
	\$40	\$209	600/unlimited	500MB	\$699		\$40	\$209	600/unlimited	500MB	\$699
	\$40	\$179	900/unlimited	750MB	\$699		\$40	\$179	900/unlimited	750MB	\$699
	\$50	\$19	1200/unlimited	750MB	\$1229		\$50	\$19	1200/unlimited	750MB	\$1229
	\$50	\$0	both unlimited	1GB	\$1199		\$50	\$0	both unlimited	1GB	\$1199
Orange 16GB	\$30	\$229	600/300	750MB	\$999	Orange 16GB	\$30	\$199	100/250	750MB	\$999
	\$40	\$189	900/300	750MB	\$899		\$40	\$189	300/unlimited	750MB	\$899
	\$40	\$129	1200/300	750MB	\$939		\$40	\$99	600/unlimited	750MB	\$1049
	\$50	\$49	3000/300	750MB	\$1299		\$50	\$29	1200/unlimited	750MB	\$1259
Orange 32GB	\$30	\$229	600/300	750MB	\$999	Orange 32GB	\$30	\$199	100/250	750MB	\$999
	\$40	\$189	900/300	750MB	\$899		\$40	\$189	300/unlimited	750MB	\$899
	\$40	\$129	1200/300	750MB	\$1029		\$40	\$129	1200/unlimited	750MB	\$1149
	\$50	\$49	3000/300	750MB	\$1329		\$50	\$29	both unlimited	1GB	\$1329
Verizon 16GB	\$30	\$219	75/250	1GB	\$799	Verizon 16GB	\$30	\$219	75/250	1GB	\$799
	\$35	\$189	300/unlimited	1GB	\$799		\$35	\$189	300/unlimited	1GB	\$799
	\$40	\$119	600/unlimited	1GB	\$699		\$40	\$119	600/unlimited	1GB	\$699
	\$40	\$99	900/unlimited	1GB	\$699		\$40	\$99	900/unlimited	1GB	\$699
	\$50	\$29	1200/unlimited	1GB	\$799		\$50	\$29	1200/unlimited	1GB	\$799
	\$50	\$0	3000/unlimited	1GB	\$1179		\$50	\$0	3000/unlimited	1GB	\$1149
Verizon 32GB	\$30	\$219	75/250	1GB	\$949	Verizon 32GB	\$30	\$219	75/250	1GB	\$949
	\$35	\$189	300/unlimited	1GB	\$899		\$35	\$189	300/unlimited	1GB	\$899
	\$40	\$119	600/unlimited	1GB	\$799		\$40	\$119	600/unlimited	1GB	\$799
	\$40	\$99	900/unlimited	1GB	\$799		\$40	\$99	900/unlimited	1GB	\$799
	\$50	\$29	1200/unlimited	1GB	\$1029		\$50	\$29	1200/unlimited	1GB	\$1029
	\$50	\$0	3000/unlimited	1GB	\$1329		\$50	\$0	3000/unlimited	1GB	\$1329
T-Mobile 16GB	\$30	\$219	750/unlimited	1GB	\$949	T-Mobile 16GB	\$30	\$219	750/unlimited	1GB	\$949
Note: Contract is for 12 months	\$20	\$199	300/unlimited	1GB	\$649	Note: Contract is for 12 months	\$20	\$199	300/unlimited	1GB	\$649
T-Mobile 32GB	\$30	\$219	750/unlimited	1GB	\$949	T-Mobile 32GB	\$30	\$219	750/unlimited	1GB	\$949
Note: Contract is for 12 months	\$20	\$199	300/unlimited	1GB	\$649	Note: Contract is for 12 months	\$20	\$199	300/unlimited	1GB	\$649
Three	\$30	\$199	750/unlimited	1GB	\$719	Three	\$30	\$199	750/unlimited	1GB	\$719
Note: Three only offers 24 month contracts						Note: Three only offers 24 month contracts					
Three	\$30	\$199	750/unlimited	1GB	\$719	Three	\$30	\$199	750/unlimited	1GB	\$719
Note: Three only offers 24 month contracts						Note: Three only offers 24 month contracts					

Step One: Simplify Your Information

Get to the point. Know what you want to say before you say it. Summarize your story/slide/section in one sentence, then walk your audience toward that conclusion.

I recently asked Rick Altman, author of *Why Most PowerPoint Presentations Suck and How You Can Make Them Better*, about a common mistake presenters make when designing their presentations. He replied simply, "Too much crap."

Altman is completely right. Many times, presenters believe that more is better. Too much may be good when

...we can only process around four bits of visual information at one time"

enjoying a piece of homemade apple pie, but in designing slides, the opposite is true. If your audience is too distracted with your vibrant color scheme, opposing

graphic styles, long bulleted lists, and complex graphics, then they will miss your message.

Connie Malamed, author of *Visual Language For Designers: Principles For Creating Graphics That People Understand*, found that we can only process around four bits of visual information at one time. Clean, clear, and easy-to-understand graphics create a visual hierarchy and allow viewers to focus on the most important information.

Step Two: Affect Emotions

PowerPoint and other presentation tools help distill information into the most salient points, thereby connecting content to our audience's goals. Great communicators know this leads to a critical second step—affecting emotions. Independent research shows that people care if the information shared can benefit them. Legendary philosopher Harry Overstreet wrote in *Influencing Human Behavior*, "Action springs out of what we fundamentally desire." When we show how we can help our audience, they become cognitively and emotionally invested in the presentation. Ultimately, it is the emotional element that carries the greatest weight. Emotions are a driver in every decision.

But how exactly can you affect the emotions of your audience and motivate them to choose your solution? There are several ways to affect emotions within an oral proposal.

- a. Reflect your audience.** Your words and images should reflect your audience's goals and challenges. Connect your solution to your audience's needs.

b. Facts tell and stories sell. Tell a story that clearly shows how your solution will (or has) achieved the customer's goals.

c. People buy people. When we can put a face to a corporation or a product or a solution, then it becomes personal to us. Oral proposals allow the presenter to speak to and connect with their audience on a personal level—sometimes face-to-face and sometimes via conversations in a webinar. Either way, the audience can interact with the presenter and have their questions answered almost immediately. They are more likely to buy into a solution or an idea if they know the person behind it.

I agree with Altman when he told me, "People come to a room to hear what you have to say." Many presenters forget that they are a major component of the presentation. Their ideas and words are more important than the slides. Slides, when used correctly, aid and empower the presenter. When used incorrectly, the presenter reduces the benefits the slides offer.

d. Communication with All Visual Elements. What we see quickly affects our emotions. Color is the first thing that makes an impression and the rest of what we see soon follows. Carefully consider your template, colors, fonts, styles, and so on. Use graphics to connect benefits to your audience's needs (help them care) and provide them with clean visuals, which causes them to feel positive about you and your solution. That leads directly to the last step...

Step Three: Use Graphics

Presentations are intended to be a visual medium. Using effective visuals helps you better communicate with your audience by simplifying the most complex content and sharing it in a **memorable** way. For example, what was the first word in step two's explanation? You have to look, right? But do you remember the first graphic in this article? Good graphics

"Sadly, most people shy away from graphics..."

are stored in long-term memory whereas text and words are decoded linearly and must pass through short-term memory to be stored forever.

Besides making your solution more memorable to your audience, another byproduct of a clear visual—which Malamed uncovered in her research—is that the easier it is for your audience to process your information, the more positive they feel about it (refer to "d" in step two).

Still wondering how distilling your information into visuals can help you? Consider the following research when creating your next PowerPoint presentation. Using graphics in presentation, educational, and marketing materials:

- improves learning 200%—University of Wisconsin
- takes 40% less time to explain complex ideas—Wharton School
- improves retention 38%—Harvard University
- increases your likelihood of success by 43%—3M and University of Minnesota School of Management

Sadly, most people shy away from graphics or choose the wrong graphic due to time constraints, lack of resources, or inexperience. Use the following Graphic Cheat Sheet to choose the best graphic for your next presentation and get graphic ideas from [BizGraphics On Demand](http://www.bizgraphics.com) (editable PowerPoint graphics): <http://www.billiondollargraphics.com/GraphicsCheatSheet.pdf>

Understand and embrace the power of presentations. Apply these three best practices to escape the dreaded Razzle Dazzle, Me Disease, and Fact-it is presentation pitfalls. Powerful presentations convey the point of your message and affect your audience's emotions—and, ultimately, their decision to use your solution or product or buy into your idea. Use visuals to help your audience quickly retain and understand your message. Interact and form a personal bond with your audience to achieve your goals.

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.

Fun Fact

Did you know that...

...listening is the most used but least taught communication activity? We use listening 45% of the time.

Talking is the next most used and next least taught communications activity, at 30% of the time.

It is followed by reading at 16% and writing at 9%. Ironically, reading and writing are the least used communication activities, but the most taught. That's some food for thought.

Source: Adapted from Lyman K. Steil, Larry L. Barker, and Kittie W. Watson, Effective Listening: Key to Your Success.



Conceptualization
Graphic Design
Desktop Publishing
Training

Win more business with...

- The highest quality “bid-winning” proposal graphics, desktop publishing, web site and marketing design, and training
- 24/7 deadline-driven service ... guaranteed
- Freedom from project management headaches

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To See the Future of Orals, You Must Understand Their Past...

by Alex Brown



contributor
Helane Jeffreys



contributor
Deb Hurley

When I was trying to come up with a question for this article, I realized a few things about myself, the first of which is that I like controversy. I believe in the old adage, “If it matters, it produces controversy.” I also realized that since I am surrounded by some of the smartest and most amazing people in the industry, I would need to talk to a few true professionals to get my answers. Deciding whom to talk to was easy for me: Voice for Success. I have known this company and these outstanding coaches for years. They have supported nearly all of the top federal contractors. If there was anyone with whom I could have a debate about orals (and not lose them as friends), these women were the ones I needed.

So with a question in mind, and me with delusions of grandeur of being the next Kerouac, I sat down ready to hit them with my premeditated questions, starting with “What do you see as the future of orals?” I should have expected what happened. With their knowledge and experience, they perfectly led the conversation, answered my questions before I could ask them, and when we were done, I had the complete outlook on orals, including

the history, today’s realities, and what the future might look like.

Winston Churchill once said, “Those that fail to learn from history are doomed to repeat it.” Voice for Success has been in business as oral presentation coaches for 20 years and were already supporting federal contractors before the FAR 15 rewrite 16 years ago.

From the outset, they saw orals as a growing opportunity for the government to benefit from an often overlooked and under used process of interviewing those whom they are getting ready to hire. This process enables them to meet the potential contractors to see if they could work with them.

For a few years, orals rules were undefined. Coaching orals was all about training the team on how to

communicate. With no directions provided in an RFP, and no clear guidance for evaluators, it was like the Wild West. Every agency handled orals differently. Finally, in 1995, the Government implemented rules and streamlined the process. Contracts started changing, multiple award proposals increased in popularity, and the clients got better at knowing what they wanted. The orals evaluations became better defined and more sophisticated – with many carefully orchestrated orals lasting for multiple hours or days.

This changed the proposal landscape on both the written and verbal sides, forcing the companies to become even more serious about preparation. Good public speaking skills were no longer enough. As in the written proposals, in orals you had to show why you were better than the competition.



Cameras, processes with murder boards, professional graphic artists, and other tools blossomed. Experience, knowledge, and communication skills became key, along with getting more and more rehearsed.

Orals presentations have evolved into deliverables as elaborate as any written proposal. They included graphics, memorized answers, and even professional video clips, if allowed – all designed to convince the evaluators to choose you. The coaches helped the team prepare, rehearse, and repeat everything until they knew there would be no surprises on orals day.

“...they want to get the information on their terms...unscripted”

To counterbalance this trend, and to avoid the razzle-dazzle of well-orchestrated sales, the government keeps changing its rules. These new rules make it harder for the contractors to deliver a unified, well-crafted message.

Helane and Deborah identified several orals trends they have encountered lately:

Shorter Turn-around: Your company may have only 7-10 days to prepare your response, including the slides. The reasoning behind this is that it forces you to respond with less polish and more raw information for the client, which helps them believe your team’s credibility.

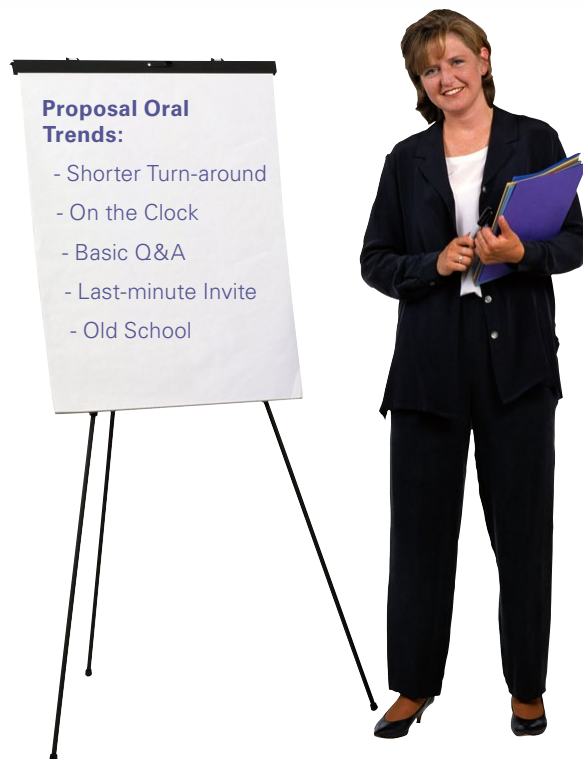
On the Clock: Your team arrives for orals and you receive the problem/scenario with only 30-60 minutes to prepare your response, and 60 minutes to present your response. The reason is that the client wants to know a few things: Do you really understand their needs? Can you come up with a solution that could work quickly? Can you create a low-risk solution that will actually turn into a job, thus winning your first task order in this competition. Finally, how good are your experts and how well can you work as a team?

Basic Q&A: No presentation is required. A team of key personnel arrives to answer the questions either based on the written submittal or a standard set asked of every team, much like an interview.

Last-minute Invite: The proposal will state the right to request orals with a 3-day lead-time notification at the downselect. The reason for this is to disallow you preparation time, to evaluate you as you truly are, in the raw.

Old School: That’s right, go to the attic and pull out the overhead projector! Some RFPs disallow PowerPoint slides. The reason is that the client does not want to be sold to. They want to know you are the best solution for them without any bells and whistles. This simpler version creates a more level playing field.

These are but a few of the new trends you could run across today. The takeaway is that the Government is coming up with these for a reason.



They want to get the information **on their terms, with real people appearing unscripted.** Voice for Success viewed the orals process as a puzzle. While the content experts hold all the information in their heads, Orals coaches need to be involved earlier in the proposal to facilitate a process and a dialogue to coax this information out and fill in the missing pieces. It is in this dialogue between the coaches and the team that the hidden information emerges that the Government customer wants to know: specific solutions with their benefits and proof. It takes even more coaching to get everyone on the same page, appearing unscripted and ready to tackle any problem or question.

So what is the future of orals? According to Voice for Success, simply look to the past. As Olessia Smotrova-Taylor from OST Global Solutions summarized it at Boot Camp this year: “*knowledge wins.*” The client wants the opportunity to meet the contractors to see if they are

To See the Future of Orals, You Must Understand Their Past...

knowledgeable enough and good to work with, much like a job interview. For you to make your best impression, and to win that government bid, coaching needs to start earlier, at kick-off or at the pink team review at the latest, and in some cases even during capture.

Because of OST Global Solutions' growth, Alex started 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 skills as a relationship builder, allow him to use his extensive personal and professional network in the federal arena for success with OST. He currently holds a marketing 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. He can be reached at abrown@ostglobalsolutions.com or 301-384-3350.

Helene Jeffreys, President of Voice for Success, Inc., has focused her company's resources on supporting orals teams presenting to the Government since 1995. Her ability to rapidly evaluate and provide each orals team member with the tailored steps leading to passionate and credible presentations has been her trademark for 16 years. Helene also provides individual coaching sessions for people who want to upgrade their communication skills in preparation for meetings with small and large audiences. Voice for Success® Inc. was one of the first communication coaching services to prepare corporations for oral presentations when the FAR-15 rewrite encouraged the use of oral presentations in 1995. During these years they have developed the tools and processes that are summarized in <http://www.voiceforsuccess.com/process.htm>. Their motto: "No surprises on orals days" reflects their determination to thoroughly train and rehearse their clients on what to do from the moment they walk in the door until they leave.

Deb Hurley has spent 16 years coaching, directing, consulting, and supporting teams preparing government orals proposals. She specializes in crafting messages that are compelling, compliant, and easy to evaluate. A passion for the people in support of their services, company and team is at the core of a successful career that has resulted in win after win. She can be reached at dhurley@voiceforsuccess.com or 301-346-1683.



How to Develop and Coach Winning Oral Proposals

Classroom Training on October 20-21, 2011 in Bethesda, MD

Learn from the industry's finest and make your next orals presentation a winner

This 2-day course gives you everything you need to win in orals – whether it is proposal management for an entirely orals proposal, a blended written and orals proposal, slide deck development, or orals coaching.

The course is taught by a team of two industry leaders in developing and coaching oral proposals: Olessia Smotrova-Taylor, who won more than \$17 billion over the course of her career in government proposals, including numerous orals, and Ben Rowland, who won more than \$3 billion in 2010 coaching orals teams by producing some of the industry's most successful oral presentations by coaching teams of more than 50 people giving oral presentations from 1 hour to 5 days in length.



Also, check out our September 21-22, 2011 class on [Preparing Winning Multiple Award and Task Order Proposals](http://www.ostglobalsolutions.com/multiple-award-proposals) at www.ostglobalsolutions.com/multiple-award-proposals

REGISTER at www.ostglobalsolutions.com/winning-oral-proposals
More information: 301.384.3350 or service@ostglobalsolutions.com

International Conference Highlights

by Brenda Crist



The focus of the 22nd Annual APMP® International Conference & Exhibits is *The Art of Winning*, based on a book by Sun Tzu, an ancient Chinese military general, strategist, and philosopher. The conference examined how we win business in a rapidly changing global economy and how we react and prepare for business opportunities. Conference speakers stressed that the better we prepare, the better we understand the battlefield; the better we know our competition, the more business we win.

Even before the conference began on Tuesday, May 31, the conference attendees got several opportunities for career development. Approximately 30 attendees took the class to acquire APMP Foundation Level certification. Nearly 20 attendees, already accredited at the APMP Foundation Level, attended a one-day workshop that guided them in completing their Practitioner questionnaire and becoming Practitioner Level accredited the next day. Other pre-conference workshops instructed attendees on how to improve their graphics capabilities and Word skills.

The conference was the largest APMP Conference to date, with nearly 640 attendees. I met attendees from most states and from countries including Canada, Egypt, Ireland, New Zealand, Switzerland, and the United Kingdom.

The Conference provided seven tracks daily that tackled different aspects of the “Art of Winning.”

1. **The Conversation Series** – enabled attendees to dialog with presenters and each other on topics including capture, competitive analysis, and proposal language.
2. **The Executive Track** – described what smart executives should

know, how to wage the capture management war, and how to deal with BD kings.

3. **The Waging War/Offensive Strategies Track** – covered collecting market intelligence, the art of decision-making, and knowledge management topics.
4. **Energy: Committing to Pursuing the Opportunity Track** – explained how to attack incumbents, use consultants, and use customers to drive contract wins.
5. **Weaknesses & Strengths Track** – described how to develop actionable intelligence, best value, and outstanding teams.
6. **Maneuvering, Key Variables, & Terrain Track** – explained



how to use virtual proposal tools, storyboards, and killer oral presentations to nail the win.

7. Attack by Fire & Employment of Secret Agents Track – described how to plan your strategic approach, leverage tools, and win production battles.



NCA members were well represented at the conference. Local presenters included Betsy Blakney, Pat Brosey, Brenda Crist, Brooke Crouter, Briana Coleman, Gillian Dionne, Neil Evans, Wendy Frieman, Eric Gregory, Colleen Jolly, Bob Lohfeld, Bruce Morton, Joan Muschamp, Mike Parkinson, Olessia Smotrova-Taylor, Randy Richter, and Beth Wingate. Other NCA members participated in taskforce groups and panels. Click on this link to obtain copies of all their presentations: <http://www.apmp.org/?page=Conference2011>.

One of the most memorable presentations I attended was the panel: Proposal Pioneers and Today's Warriors. Proposal Pioneers Bob Lohfeld, Steven Myers, and Stephen Shipley described how the proposal management profession evolved and their predictions for the future, which included "virtual everything", cloud capitalism, and better batteries for powering our electronic devices.

They encouraged us to continually challenge the status quo and predicted a high growth rate in APMP membership worldwide. Today's warriors Briana Coleman, Christopher Kälin, and Olessia Smotrova-Taylor countered with their predictions for the future which included increasing use of social media, globalization, and virtual offices and decreasing proposal budgets resulting in the need for more well-rounded skill sets.

The Denver Exhibition Hall was occupied by more than 23 vendors representing proposal consulting companies, tool vendors, and graphic artists. Click here to learn more about the exhibitors: <http://www.apmp.org/?page=ConferenceExhibitors>.

NCA members also received awards and recognition. Keith Wallace, Senior Proposal Development Manager at Wyle, obtained APMP Professional Level accreditation status, while others, including Judy Nguyen of General Dynamics Information Technology and Alexis Dimouro of Nova Datacom LLC, acquired APMP Practitioner Level accreditation status. The following NCA members became APMP fellows:

- **Brenda Crist – Lohfeld Consulting Group (NCA President and Chapter Chair of the Year)**
- **Kristen Dufrene - CACI**

- **Wendy Frieman – Lohfeld Consulting Group**
- **Bruce Morton – Mantech**

Former NCA President Michael Scruggs gave out label pins introducing the new APMP NCA logo, which will be displayed on our new website scheduled to debut in July.



NATIONAL CAPITAL AREA

New APMP International Executive Director, Rick Harris, gave an insightful presentation on new directions the association is taking. Rick will be driving a new marketing and branding campaign, promoting transparency in the organization and encouraging membership from proposal professionals supporting commercial bids.

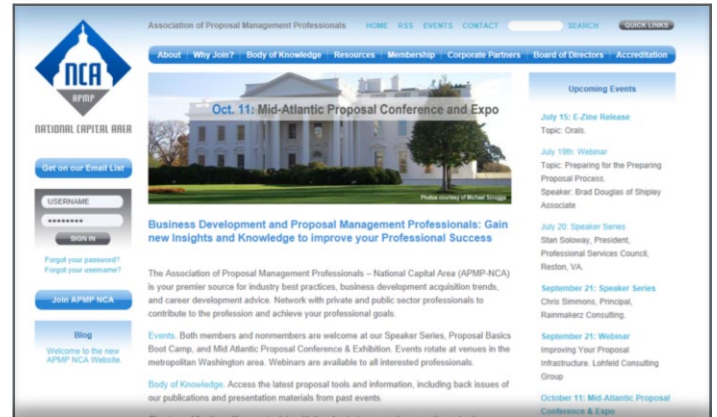
The next APMP International Conference will be held in Dallas, TX. I look forward to seeing you there.

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.

Announcing the New APMP-NCA Website

This week APMP-NCA released its new website. The website features a modern logo, practical design, and many new options to benefit members including:

1. A sign in feature enabling APMP-NCA members to select their own user name and password
2. A rotating gallery and event calendar on the first page linked to an event summary and registration option on the second page
3. Improved options for helping you manage your membership
4. A searchable knowledge base accessible using your APMP-NCA user name and password
5. Integration with social media including the APMP-NCA LinkedIn account



[Click the link to explore APMP-NCA's new website now!](#)

If you want to get ahead, you have to look ahead. Join us on October 11 for your most informative, most inspirational day of the year.

Today's Vision, Tomorrow's Reality

Your most productive day of 2011 will be spent out of the office, at APMP-NCA's biggest event of the year. Our annual conference brings you:

- 20 skill-building sessions presented by industry professionals, across four knowledge tracks—plus a keynote presentation to kick off the event
- An Expo where Corporate Partners bring you up to speed on the latest products and services for proposal pros
- Opportunities for networking with colleagues—renewing old relationships and beginning new ones to enrich your network
- 10 Continuing Education Units toward your APMP professional accreditation

Word to the wise: Last year this event sold out two weeks before the event.

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Ten Steps to Oral Presentations that “Bring Home the Bacon”

by Larry Tracy

Prologue

Those who have heard me speak, or read my articles in this eZine or in Russell Smith’s OCI Newsletter, probably think of me as “Johnny One Note,” as I am always preaching that Proposal Managers, Capture Managers and Proposal Writers, hereafter described as Proposal Professionals, should work hand-in-glove with Program/Project Managers (PMs) who head orals teams. This article is indeed old wine, but hopefully in a more user-friendly decanter.

My introduction to APMP-NCA, and vice versa, was in May 2007 when I spoke at the Roundtable on the need for a “Blended Bid,” urging greater integration of the efforts of those writing the proposal and the PMs who had the responsibility of delivering a winning oral presentation. After becoming an APMP-NCA member, I followed this theme at the 2010 International Conference in Orlando, as well as at regional Conferences at which I spoke in Boston, Atlanta, and Nottingham, United Kingdom.

In my three years in APMP-NCA, I have come to the conclusion that for many Proposal Professionals the goal is to have their proposal make the “competitive range,” with the oral presentation an afterthought. I think the goal should be winning the contract, which will come only if the orals



team delivers a winning presentation reflecting the theme of the proposal.

I am also a member of the Project Management Institute of Washington (www.pmiwdc.org) and spoke at a PMI dinner in November 2010 on the subject “Bring Home the Bacon”—what PMs heading orals teams are expected to do. My two-part article on the subject is available on that website, and you need not be a PMI member to access the “Articles” section. The articles were also published in Russell Smith’s OCI eZine.

The reaction by PMs to my November presentation was quite surprising. I received several emails, calls, and personal comments urging me to “keep hammering away” on the theme of collaboration. I found a frustration on the part of many PMs that they are not consulted sufficiently when proposals are being written, and are often

presented with the fait accompli of a detailed, multi-page proposal which they must convert in limited time to a 60 minute oral presentation. Can you blame them for being frustrated?

One PM, in a lengthy email to me, claimed his company, an incumbent, lost “a re-compete that was thought to be a slam-dunk” because the Proposal Professionals, despite repeated requests from the PM, would not leave their “lovely campus in the suburbs of Washington” to come to the work site to see the challenges on the ground. Coordination was by email and conference call, and “critical errors crept into the proposal,” errors he was confident could have been avoided by a closer partnership between the writers and the people on the work site. The result was that the “slam dunk” became an air ball, and the company lost the contract worth millions, and many were left unemployed. This PM

blamed the loss squarely on the failure of the Proposal Professionals to work closely with the PM and those on the work site.

Sour grapes? An isolated case? I don't know, but common sense suggests those writing the proposal should want to protect their investment by working closely with the technical experts who will carry the ball in the oral presentation. When competing proposals and price are virtually equal, the oral presentation may be the “tie breaker.”

I hope the Ten Steps outlined below can be a useful guide to integrate the efforts of you who write and those who present, so the result is a contract-winning synergy that “Brings Home the Bacon.”

1. Proposal professionals and PMs/Orals Team Leaders should collaborate from pre-release of RFP onward.

When word starts to circulate that the government or a commercial firm is working on an RFP/Solicitation, an excellent opportunity presents itself to shape the RFP so it is in the sweet spot of your company. Why not take the PM who is likely to be chosen to not only carry out the contract, but also to be the lead presenter if an oral presentation is required? The customer will have the opportunity to get to know this key person, who can provide enough technical advice to perhaps influence the selection criteria in the RFP. Additionally, if the PM has a well-known reputation in the field, this could increase the confidence of the customer in your firm.

2. Technical experts on the Orals Team should participate in the initial drafting of

the proposal. This enables their technical expertise to be applied early, and allows them to extract the “nuggets” of the written proposal. When the RFP/Solicitation is released, and the initial drafting of the proposal begins, invite the PM and some of his team to participate. The Proposal Professionals are in charge, but the technical experts can provide input to strengthen the proposal. They will learn the discriminators being built into the proposal so they can verbalize these important distinctions in the presentation. Additionally, they will see the theme the Proposal Professionals are developing, and be able to extract “nuggets” to place in the oral presentation, which they will soon be developing.

3. Once the theme of the proposal has been decided upon, these technical experts should initiate the first draft of the oral presentation, maintaining continual contact with the writers. The PM and his/her team will have to know the direction the proposal is taking from their participation in the initial proposal drafting session. Now they start drafting the oral presentation so it reflects the proposal theme, which “answers the mail.” The PM should start developing “bookends” of the presentation – his or her opening remarks and the closing, which specifies why your company is the best option for the customer. The continual communication between writers and presenters assures consistency and avoids the “apples and oranges” problem.

4. Include the Project Manager/Lead presenter and

other members of the orals team in Red Team and other proposal reviews so they can integrate results into the oral presentation. The Red Team Review should most definitely have the PM and members of the orals team as active participants. They will see how the proposal has developed, and their technical expertise will allow them to spot problems. Moreover, the Red Team is an excellent preparation for the upcoming simulated oral presentation, or “Murder Board,” to borrow a term from the military.

5. Bring in an Orals Coach.

Readers are probably not surprised that I, an Orals Coach, would make this recommendation. Proposal Professionals are experts on the written word, and the PM and members of the orals team are technical-engineering experts. The orals coach can advise on body language, word choice, and phrases to use which will resonate with the evaluators. The coach can work individually with presenters who need extra attention, as the presentation skills of the technical experts probably require some work. These technical experts will be under great pressure, knowing their performance can make, or cost, their firm millions of dollars. The coach can also work with the PM on his/her opening and closing, perhaps the most important part of the oral presentation.

In addition to providing knowledge of the speaking art, the coach can be much more frank in providing constructive criticism to presenters than fellow team members, who, wanting to maintain positive working relationships, may be “kinder and gentler” in their critiques of presentations. The coach's objective is to blend

the techniques of effective presentation skills with the expertise of the presenters. The fusion of these two elements produces contract-winning presentations.

I believe many APMP-NCA members think that a well-written proposal that “answers the mail” of an RFP is sufficient, and an oral presentation is merely a formality. I would recommend those of you who hold this view to heed the words of a former executive of the world’s most successful strategic consulting firm, McKinsey & Co., Robert Garda, now a Professor at Duke University’s Fuqua School of Business, was quoted in the book *The McKinsey Mind* as saying,

“I’ve put half-baked ideas into great presentations and seen them soar, and I’ve put great ideas into poor presentations, and watched them die.”

What if you write a brilliant proposal that responds precisely to the requirements of the RFP, and then watch a poorly-prepared orals team deliver a disastrous presentation, while a competing company does a brilliant oral presentation of an inferior proposal? Are you willing to take that chance? That’s why an Orals Coach is a good investment.

Lee Iacocca, in his autobiography, summed up the problem of brilliant engineers who need coaching in presentation skills when he wrote,

“I’ve known a lot of engineers with terrific ideas who had trouble explaining them to others. It’s always a shame when a guy with great talent can’t tell the board or committee what’s in his head.”

Iacocca has a warning for companies competing for contracts: “Terrific ideas” can easily be trumped by those who can deliver a coherent, compelling presentation. If your competitors are improving the presentation skills of their technical experts because of the importance they attach to oral presentations, while you rely on your superior ideas, programs, and experience, you may find your firm losing millions of dollars. A small investment in presentations training can pay large dividends when lucrative contracts are awarded.

A final word of caution. Steer clear of Orals Coaches who put so much emphasis on “stagecraft” that they appear to be attempting to convert engineers into Shakespearian actors. Substance must be king, not style. But substance delivered poorly can sink an orals team. The Orals Coach can help blend substance with style, so that, drawing on Professor Garda’s comment, you put “great ideas into great presentations.”

6. Conduct initial “Murder Board” simulated oral presentation, with the Orals Coach providing advice and Proposal Professionals playing the role of the evaluators.

The Murder Board is to oral presenters what the flight simulator is to pilots. Lockheed Martin had a commercial on television a few years ago that showed two fighter jets maneuvering, with a dramatic voice intoning, “If you train the way you’ll fight, you’ll fight the way you trained.” I would add that if you practice the way you’ll present, you’ll present the way you practiced.

“Substance must be king, not style. But substance delivered poorly can sink an orals team.”

The Murder Board permits presenters to be: (1) more responsive to the informational needs of the evaluators, (2) develop answers for likely questions to be asked, and (3) gain confidence in their speaking ability. Presenters learn from their mistakes, and anticipate questions and objections. Ideally, the Proposal Professionals should role-play the government evaluators. No one knows the proposal’s strengths and potential vulnerabilities better. These Proposal Professionals can anticipate the objections evaluators may have, and can help the presenters address them in the presentation, thereby preempting any questions that might be in the minds of the evaluators as they listen.

By role playing the evaluators, the Proposal Professionals can also assure the presenters follow the theme of the written proposal, and do not freelance. A relatively smooth presentation can persuade evaluators that this team, which will be carrying out the contract, is highly competent. Conversely, evaluators may conclude that a team that cannot make an effective presentation may be equally inept in carrying out the contract. The initial Murder Board, in my judgment, should not be videotaped so as not to place “performance anxiety” on the presenters.

7. Subsequent Murder Boards

Boards. After the initial run-through, the video camera should be employed. I prefer using two, one to capture the entire presentation, the other for individual presentations so the presenters can review on their own. The Orals Coach corrects negative non-verbals, such as excessive use of “Uh,” “You know,” boring monotones, and other abominations of the English language, which can be a distraction and lessen the impact of the message delivery. You should conduct as many Murder Boards as time permits.

8. Conduct Separate Q & A Murder Boards

The RFP will generally call for a separate Q&A session for clarification purposes after the formal presentation. Consequently, separate Murder Boards should be conducted with those role-playing the evaluators asking the questions. The PM should quarterback this session, directing questions to team members according to their respective expertise. The stress level will probably be less on presenters during the actual Q&A session because it will take place within the more familiar conversational context. Presenters should be cautioned, however, that they are still be “on stage”, so they should not be lulled

into a false sense of comfort. Again, the sessions should be videotaped and reviewed to develop better, more concise, answers.

9. The orals team sallies forth to “Bring Home the Bacon.”

The orals team should stay at a hotel near the location of the presentation. They should arrive at the presentation site as early as the government will permit to set up, and should have backup laptops, projectors, bulbs, and extension cords. Being so attentive to detail sends a psychological message that the team “has its act together.” During the opening and closing of the presentation, the PM must emphasize the key discriminators separating his or her company from competing firms. Perhaps the company has proprietary software or some other unique capability, which will greatly enhance accomplishing the requirements of the RFP. The PM must subtly send the message that “if you don’t give us the contract, you will not have access to this capability.”

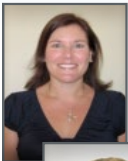
10. The orals team, if possible in conjunction with the Proposal Professionals, should conduct an immediate “Post-Orals Analysis.” After the presentation, the team should conduct an immediate “Post-Orals

Analysis,” focusing on the reactions of the evaluators and their questions in the Q&A session. It will be an added benefit if some of the Proposal Professionals can attend. This review can set the stage for the next proposal and orals the company will make. Win or lose, seek a debriefing. You will gain “intelligence,” which will improve your next proposal and oral presentation.

Epilogue

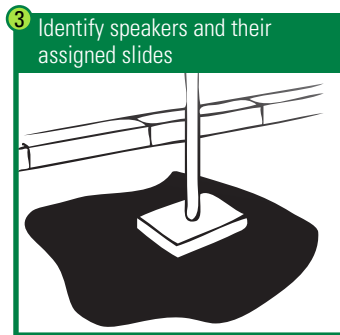
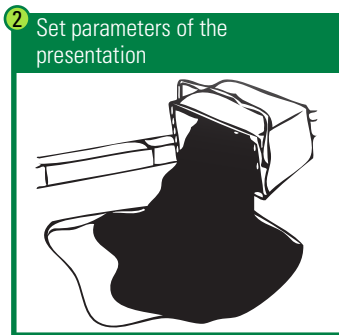
I hope these suggestions will help Proposal Professionals and PMs/Orals teams see that their respective efforts are not ends in and of themselves but instead interdependent means to achieve the end of winning the contract. This is especially true as the oral presentation can often be the deciding factor when the competing proposals are virtually identical in solving the customer’s RFP-expressed problem. You, Proposal Professionals, can protect your investment of time and intellectual creativity best by working closely with the orals team, not treating them as distant cousins. When you combine your complementary skills, you increase the chances of “Bringing Home the Bacon.”

Larry Tracy, author of *The Shortcut to Persuasive Presentations*, available on [Amazon.com](https://www.amazon.com), has been cited in various publications, including *The Information Please Business Almanac and Sourcebook*, as one of the top presentation skills trainers/coaches in the country. A retired Army colonel, he formerly headed the Pentagon’s top briefing team, responsible for daily intelligence briefings to the Chairman of the Joint Chiefs of Staff (CJCS). He supervised more than 500 of these multi-media presentations, and personally briefed the CJCS almost 100 times. He was later detailed by the White House to the State Department to debate controversial foreign policy issues to hundreds of demanding, often hostile audiences, leading President Ronald Reagan to describe him as “An extraordinarily effective speaker.”



Lost in Presentation – We’re on a Bad Road Navigating Through Oral Presentation Potholes

by Laura Kijak and Tim Pepper



The Problem

Tim’s son just completed a stop-motion animation school project using PowerPoint. At 1,068 slides, it contains no story, plot, theme, or message; just a collection of flashing lights and moving shapes that continue in an endless loop when played. Oral proposals carry the same inherently dangerous potential unless carefully managed.

Oral proposals offer challenges similar to other public speaking events along with the added pressure of hard deadlines, required and notably dry content, designated participants who may not be comfortable in front of a group, and presentation format variations. The added challenges may drive the speakers to compensate for their weaknesses by creating more content than needed in order to bury the receivers under an avalanche of slides or in an attempt to cover all contingencies, variations, or scenarios in minute detail. These and other issues represent potholes on the proposal journey in the pursuit of a successful oral presentation.

The Process

The Proposal Manager sets the tone for the bid. Early engagement of the Proposal Manager and clearly setting expectations for the final product remain vital from the beginning.

1. Build the compliance matrix and presentation outline, draft the master template for the presentation look and feel, and get the team moving on storyboard development.

2. Set the parameters of the presentation. These are often explicit from the RFP. Time allotted, number of speakers, rules of engagement, and so on. Familiarize the team with these boundaries early and reiterate often. Remind them of the end game from the outset.
3. Identify the speakers and their assigned slides from the beginning.
4. Set the expectation early for practices and time commitment.

Recommended Best Practice:

The speaker gets “ownership” of their particular slides (up to a point within consistency). Since they have to present it, they need to smooth it. Management and other reviewers are allowed to provide feedback for refinements and message corrections, but ultimately the speaker needs to own their slides for best conveyance of ideas.

Potholes:

- Stick to the allotted number of slides. Many times as writers/speakers begin to develop slide content, they want to keep adding and adding. Say NO, within reason.
- Speaker issues:
 - Assigned speaker does not have the time to dedicate to the development of their slides? At minimum, have them lead their section. This keeps them engaged and they still have a say in what gets put on a slide.

- Assigned speaker is not the subject matter expert of the topic? Still, make them lead their section and facilitate access to the relevant experts.

What to put on the slide

Limit your content to the text and graphics essential to conveying your meaning.

1. Find the main points of your presentation – the points you absolutely must get across to achieve your objectives. Bring your main points in early.
2. Slides should complement your spoken delivery and contain sufficient content to provide the necessary framework to support your script.
3. Audiences tend to remember more of the top half of slides than the bottom half. Put your main points at the top of your slides.
4. Use clear graphics. Charts, diagrams, process flows should follow a logical order for the audience. Top-to-bottom, left-to-right, larger to smaller, etc. Avoid detailed complexity. The audience should grasp the intent of the graphic in 10 seconds or less.

Pothole: Remove extraneous “fluff” content.

- Use short phrases and text, not sentences. The speaker can expound on concepts during the presentation. Resist typing every word on the slides. These are not scripts, they are slides.
- Use clear graphics to contrast narrative slides and convey concepts

Presentation length

Finish early. Give yourself a few minutes to spare.

1. Listening takes twice as long as reading to comprehend.
2. Budget between 1 - 2 minutes per slide. A 60-minute presentation should have a maximum (horrible) of 90 slides and minimum (best case) under 30. Realistically expect somewhere between 50 and 80.

We once had a presentation team that felt the absolute need to include every numbered paragraph of the SOW in their slide deck. One slide for each drove the creation of 80 slides containing nothing but the SOW paragraph and its text. The team’s argument was that if they included the slides, they would receive credit for presenting the full SOW in their briefing. The practice sessions became a blur

of flipping pages on the screen in order to keep within the allowed timeframe and the SOW slides ultimately were deemed of no value. It was a hard way to teach that lesson.

Pothole:

- Resist adding slides. The Proposal Manager must stay strong. Fewer slides means the speakers can spend more time on each slide, provide details, and other supporting data.
- If the team is pushing for more slides to answer the RFP, push them to expand their scripts instead.

Best Practice – Practice, Practice, Practice

The best advice we can give about oral presentations is - Practice Early, Practice Often.

As slides get populated, begin practicing in front of people. It doesn’t matter if the whole presentation isn’t done yet. Get up and speak.

Practice the first 2 percent of your talk for at least 20 percent of your preparation time.

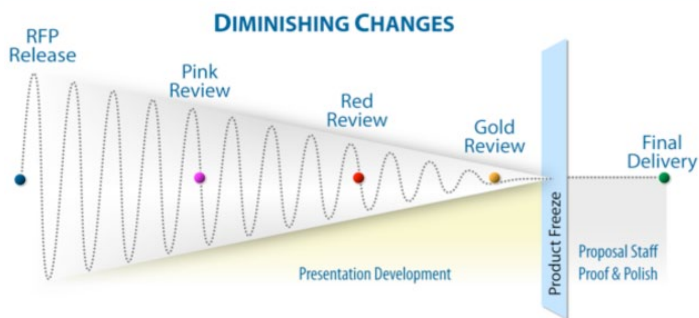
Pothole: Waiting to Practice

- Practicing with incomplete slides. Many speakers resist this because the presentation isn’t complete. Practice anyway. Talking through their slides will help identify missing or inconsistent information early.
- No time to practice. Practice anyway. Engage senior management to reinforce the importance and get “buy-in” as needed. In person is best, but video teleconference (VTC), Web media, conference calls are still effective. The more times a speaker practices their slides and talking points, the easier it is for them to finalize their content.

Revisions

In our business, no organization chart ever survives the first proposal review. We have long ago stopped expecting proposal teams to agree upon the “best way” to show a process, concept, or response to a specific requirement. As you develop your presentation, expect large changes during the first few rounds as the speaker “dials in” and refines their content and flow.

Enforce compliance and the changes should be fewer and minor as the practice continues. Target consistency across subject areas and practice transitions between speakers.



Review teams and peripheral input from management should be coordinated by the Proposal Manager in conjunction with the speakers in order to minimize conflicting feedback and potential redirection of messages late in the game.

Final Production

Like all proposals, oral presentations expand development time in parallel with the time allowed. Remember to preserve sufficient time for the proposal staff to polish the slides. Typos, fuzzy text, and unclear graphics at the presentation detract from your message and negatively reflect upon the perceived product quality of your firm. A thorough compliance check is essential prior to delivery of the final product.

Pothole:

Insufficient proofing and production time. Make sure your proposal shop retains enough time to thoroughly review the slides. If you have over 100 slides, plan on at least 2 days to proof, edit, and tweak the format for the best presentation.

Summary

A well-timed, effectively-presented briefing by a team that has practiced their content and speaker transitions, and

demonstrates clear, simple, and efficient slides offers a level of professionalism that will resonate with the evaluators. We know that many oral presentations offer dry content, speakers who are uncomfortable speaking, and use too many slides to cover all possibilities.

When the Proposal Manager maintains control of the presentation by enforcing the schedule, limiting the number of slides, controlling slide content, and having the presenters practice early and often, they help ensure a smooth and professional presentation. Strong delivery of a consistent story, threaded themes, and a clear message contributes significantly for the highest score in contrast to a the equivalent of a meaningless collection of flashing lights and moving shapes that continue in an endless loop when played.

Laura Kijak has over five years of experience in capture, proposal management, and coaching planned and unplanned oral presentations for the DoD market, and over 10 years of experience as a technical writer for Aerospace, Manufacturing, and Engineering companies. She is a Principal Proposal Analyst for General Dynamics Information Technology in San Diego, CA where she supports written and oral proposal efforts (including research, writing, editing, and managing) across multiple divisions. She has a Bachelor’s Degree in English from California State University, Chico and an Advanced Certificate in Technical and Scientific Writing from San Diego State University.

Tim Pepper applies over 18 years of experience in capture, proposal, and program management for the Federal and DoD markets. 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.

Note From the Editor:

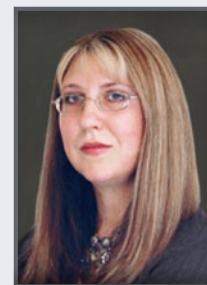
Please take a few minutes and let me know:

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 ollessia@apmpnca.org or at 240.246.5305.

Olessia Smotrova-Taylor President/CEO, OST Global Solutions, Inc.
Executive Summary eZine Chair and Editor



I'm Here to Deliver a Winning Proposal, Not for Behavior Modification

by Louise Jacobsen Fisher



It's junior high school all over again. As the popular business developer leaves the room, the geeky technical lead says sarcastically, "Well, at least she has the right wardrobe for her job."

We've all been there. Whether you're leading a group to the final oral presentation or gathering critical information from a Red Team review, your task is to deliver a winning proposal, relying on a team of SMEs or writers who, for various reasons, do not want to cooperate. You're not just herding cats, as in the classic EDS commercial, you're herding backbiting, bickering, scratching cats who can derail your mission of delivering a professional product.

Here are a few suggestions to get all your cats to stop fighting, from a mediator and HR professional with a top-10 Federal IT contractor. These tips can help you focus on meeting your goal of delivering a winning proposal or presentation without calling for security backup.

Simple Goal. Post a one-line goal on a white board in the war room or in a common area for all team members to see. The goal can be as simple as "Our winning presentation is due Monday, Sept 15." This goal, clearly stated, shared by the entire team, and prominently posted, serves as a constant reminder of the overall mission and deliverable. Individual team members can have their own goals and deadlines but ultimately they must submit to the overall team goal.

Epitome of Cooperation. As a proposal manager or orals presentation coach, you have to epitomize the spirit of total cooperation and can-do attitude. Leading the team through a sing-a-long of "On the Good Ship Lollipop" or "Onward Christian Soldiers" at every morning standup may be overdoing it. A better tactic for creating balance starts with establishing a "No-Whine Zone" where negative criticism or sarcastic comments will not be tolerated or are, at the least, ignored. Negative

comments promote negative attitudes that can become pervasive; participants begin to feel that the proposal effort is less like the mission of a cooperative team and more like a collective ordeal.

Straight Shooting. Be direct when it comes to any issues standing in the way of achieving the team's goal. Address issues immediately. For example, if a team member cannot have a discussion without making negative comments about other team members or subcontractors not in the room, then give the team member 10 minutes to privately discuss his concerns. If any of the concerns are valid, thank him for his input; now you and management can make an informed decision. Remind the naysayer that now that his issues have been aired, those comments are no longer needed.

Call the Caterer. You may be the only person on the team expressly dedicated and paid to be there. Most of the non-proposal staff is working with you under threat and duress. Their supervisor has just pointed out that section in their annual review "Has the employee contributed and/or participated in marketing initiatives, including proposals?" As the leader, do your best to make the proposal environment as pleasant as possible. Keep your staff well fed. The attitude-adjusting power of a platter of assorted bagels with strawberry cream cheese on overworked, grumpy SMEs first thing in the morning is amazing. Of course, it is wise to follow best proposal practices with productive, time-effective meetings, but never

underestimate the power of free, quality food and full stomachs. Caveat: alcohol consumption is best avoided until the win celebration. While it may briefly create a spirit of camaraderie, this quickly deteriorates into a variety of unproductive behaviors and total disregard for compliance.

Lie. Your tech lead is habitually late meeting his deadlines? Thank him profusely for all his hard work and dedication, without which this proposal would abjectly fail. Your Red Team reviewers disregard your instructions and spend their time talking about typos and formatting rather than the technical sense and compliance of the content? Express deep gratitude for the insight and expertise they brought to their review. The more appreciated people feel for what they've done, the more likely they are to try to live up to those compliments and your gratitude for their next assignment. Most will actually feel more dedica-

tion and commitment when you make them understand how important their contributions are both to the success of the project and to you personally.

There are myriad reasons for proposal success or failure, many of which are totally beyond our control. We can't change a deadline or the proposal font size from a 12-point Times New Roman to a space-saving Arial Narrow 10. To a certain extent, however, we can help foster a cooperative, focused, positive, well-fed environment for our team. As proposal managers and orals presentation coaches, we are not there for behavior modification, but we also cannot sit idly by and let a team spin off into disaster. The negative proposal manager who inflames a difficult team and the oversensitive leader who gets bogged down catering to negative personalities or personal agendas can both lose sight of the true goal. There is a place in between those extremes.

Once the proposal is delivered or the oral presentation is over, the team members can revert to their workaday personalities, whatever they happen to be. Until then, they need to check their personal agendas and peeves at the door and help meet the team goal of delivering a winning proposal or presentation.

Louise Jacobsen Fisher is an APMP-certified proposal manager and capture manager and has herded proposal cats for close to 20 years. Her experience includes providing full bid life cycle services including business development, capture management, proposal management, and writing/editing. Louise wins work with Federal agencies including the U.S. Departments of State, Homeland Security, Treasury, Interior, Energy, Housing and Urban Development, and Health and Human Services. She is highly regarded for ability to call only the best caterers and her knowledge of medical IT and Department of State opportunities. You can catch her act at the Bellagio in Vegas or the Catskills later this summer.

Fun Facts

...Marilyn Monroe spoke in a breathy and alluring voice not to sound sexy, but to avoid stuttering.

...Winston Churchill, thought to be one of the best orators of his time, memorized every speech backwards and forwards ahead of time to hide his stutter.

... Grace Kelly was so ashamed of her harsh Philadelphia accent that she asked her father at 18 for a tape recorder and worked hours listening to her voice and correcting inflections with great discipline.

...The ancient Greek orator Demosthenes, was born with a serious speech impediment, talked with pebbles in his mouth and recited verses while running uphill. To strengthen his voice, he spoke on the seashore over the roar of the waves. His discipline and determination helped him become one of the greatest orators of Ancient Greece.

So, you see, even the greatest problems can be overcome!

Delivering the Right Message at Orals: A Lesson in Branding Orals—All About Planning

by Rebecca Frye



Almost every single member of our field has participated in an Orals presentation at some point in their career. Generally speaking, Orals is an in-person presentation summary of a proposal, sometimes including a formal Q & A session, frequently held on-site at a customer's facility. For those of us familiar with this activity, we have also been exposed to the battle cry that accompanies such a customer request. Orals announcements are generally daunting because we know what is to come: rushed timelines, travel stress, and most predominantly, a general fear of the unknown.

This fear of the unknown, coupled with the general demeanor of most proposal teams, can often result in a stiff, cold, military-esque message, delivered by a group of subject matter experts who are poor presenters. We plan constantly from beginning to

end in the proposal process and Orals are no different. We think about the message, win themes, and logistics, and imagine every possible element of the activity. But do we think about who will deliver the message and why it is relevant or important?

Orals—All About Branding?

Elements of Branding (According to Entrepreneur.com)

If we explore the idea of Orals from a different approach, I believe we can improve how we work to prepare for this proposal milestone. The initial idea that comes to mind when we remove the proposal terms and conventions from Orals is most broadly, branding.

According to Entrepreneur.com, there are four elements of branding: differentiating your brand, promising value, being a market leader, and integrating your message. When reviewing these ideas, we see more and more of a con-

nection between Orals and the fourth element, integrating your message. That is what Orals is about: showing the customer your confidence, ability and commitment in a public setting, and reselling them on your solution.

Successful Brands Have Connected Through a Story

If we evaluate some of the most successful brands today we see that they are telling a story; they are selling a feeling or idea and then reinforcing that through every advertising mechanism available. Several brands in particular come to mind when discussing exemplary branding stories: Vaseline®, Q-Tips®, and Band-Aid®. Their branding story is so strong and trusted that we often use the brand name to refer to the general category of products (Vaseline® versus petroleum jelly). Imagine if we could harness this branding expertise and ensure this sort of story and conviction after completing an Orals presentation!

What Is Your Story?

Understanding Your Customers' Needs and Remembering Win Themes/Take-Aways

So what is your story? This is something, which you (hopefully) defined and reviewed well before you drafted the proposal. Your story is a compilation of your differentiators, win themes, customer benefits, and company identity.

Orals provide a platform to more definitively share this story with your customer and leave them with a lasting impression of your company. Using this opportunity to brand yourself strongly could provide the extra element needed to leave the customer with a “Wow!” at the end of the day.

Telling Your Story

It is important to consider all aspects of Orals when planning to tell your story effectively. These factors can include location, displays and graphics, team appearance, message, etc. One element that we too often forget to consider is our presenters.

Choosing Your Presenters Wisely

Defaulting to the proposal team members as the team for Orals can work in some cases, but remember that not all strong writers are strong presenters. Some people can give successful presentations, but others can truly grab the full attention of the room and deliver more charisma or personality. You should consider this style factor, especially when you use a story-telling approach.

We know and understand that different visual and auditory cues can impact decisions and engender different feelings in people. For

example, some people associate seeing someone in a uniform with security and comfort. People often identify age with wisdom or youth with creativity. These associations and feelings may not always be factual or accurate, but they can contribute to the success or mediocrity of our storytelling. If you are looking to tell an overall story of trustworthiness, work to ensure that the person or people you select to present can cue that feeling in the audience, or convey characteristics of that feeling. Sometimes this occurs from their title, presentation style, tone, physical appearance, dialect, or their personality or demeanor.

Key Attributes of a Strong Presenter

No matter whom you choose to represent you at Orals, remember that they should possess the key attributes of a strong presenter. Some of these attributes include the ability to comprehend the material that they are presenting in addition to the ability to speak well in front of others. Abilities can range from simple to complex, such as the ability to react quickly on their feet, comprehending the limits of commitment, or understanding the company's stance on key issues all the way to being able to deliver a clear message within the time assigned. Determine what is most important about your delivery, and ensure that your presenters possess the right abilities for the job at hand.

Branding Your Story

If the idea of branding as an approach to Orals appeals to you, remember that the key to successfully conveying brand value is in the smallest details. Planning comes naturally when we prepare for Orals, so do not be afraid to over-plan when creating a brand for

your solution. When following this approach, review every element and detail of your presentation and evaluate it to see if it is telling your story and driving home your message.

See, Hear, Feel – Driving Home Your Message

If you have studied your customer to know their needs and you successfully deliver a message, which matches and addresses those needs, the customer will be left with a lasting positive impression long after the projectors and microphones have turned off.

“Review every element and detail of your presentation and evaluate it to see if it is telling your story.”

Rebecca Frye is a Proposal Manager for Harris Corporation, Public Safety and Professional Communications division, in Lynchburg, Virginia. Rebecca has 5 years' experience in proposal writing and management from her work at Harris and previous work at a local consulting firm. Rebecca is a member of APMP and has a Bachelor's of Science in Psychology from Ferrum College.

Process is King, but People Rule!

by Susan Trivers



Proposal leaders embrace Process. Detailed, specific, task and time-bound processes have helped countless companies complete millions and millions of tasks. Contractors promote their processes to their customers as a sure-fire way to reduce risk and guarantee desired results. Proposal professionals work hard to achieve formal recognition of their process prowess with certifications.

Yet lurking behind all this commitment to Process is a sense that it doesn't always work as intended...

While Process is king, many people's actions or inactions derail your favorite processes. I've found this to be especially true for Orals. In Orals, the focus is on the human beings: who they are, what they know, how they will work with the customer and each other; whether they are likeable, trustworthy, and authentic. Orals bring

out the best—and the most vulnerable aspects— of the people involved.

As your focus turns from solution-creation to writing to Orals, more and more opportunities arise for the people to overrule the process, intentionally or inadvertently.

Corporate Culture

Corporate culture develops at the top and flows down. There may be rules in the kingdom, but the actions and behaviors of people can overtake them.

"No one on our team has the authority to tell the subject matter experts to come in early and prepare with us," the capture manager told me. Thus, the schedule and best practices we were intending to follow were moot. Segmentation is a common element of corporate culture, even as companies talk about avoiding silos. Companies may be divided into divisions or

business units or by customer type. If the customer you're preparing your Orals for is expecting solutions that cross your company's divisions, be prepared to struggle to get the resources you need. On paper it seems logical that Bob can come over from the civil sector and Joan can contribute even though she's part of the cyber security team. If autonomy is a strong component of your corporate culture, your process will be overruled.

When corporate culture allows for a heavy focus on criticism, often under the guise of continuous process improvement, your team's work on the Orals can be subject to repeated scrutiny that requires re-work and causes delays. An abundance of editing and revising slides increases the uncertainty of the presenters about the best oral content. When it's common for every reviewer to have their say, no matter how many times a point has been made, presenters get overwhelmed by the criticism. The corporate culture that allows senior managers unlimited criticism of the Orals ruins process and ultimately risks hurting the Orals score.

In one Orals presentation I coached, a DoD agency required the people who would be doing the physical maintenance and repair work to be the presenters. These people were experts in equipment and the living conditions of the troops. Yet the Pink Team review was led by a retired four-star general who burst out with a string of savage criticisms the minute the practice presentation was finished,

setting the progress of the presenters back by days we didn't have in our schedule.

Another hugely counterproductive cultural style is that of senior people telling the speakers what to say, word for word. I remember one capture manager who became the program manager—an intense person. With the bid on the line for him, he kept insisting that the other presenters say what he told them to say. After every practice he would repeat word for word what they said and tell them how to say it differently. This caused huge bad feelings and a lot of tension. He even took this approach in front of the customer's selection board, leaving them with the impression that the whole team was dysfunctional. They did not win. There was a clear and workable process in place that was overruled by one strong-willed individual; and a corporate culture that gave him enough rope to hang the whole team.

Some corporate cultures promote stereotypes and hierarchies. Do you glibly describe engineers as smart people who can't put two spoken sentences together? Do you bestow respect on senior executives but not so much on people lower in the chain of command? Does every decision have to be blessed by someone from above? When the Orals team has no authority, the process they are work-

ing by gets suspended time and again as they wait for permission to move ahead.

Time

Time—schedules, deadlines, due dates, pens down deadlines, color reviews, progress reports, graphics turn arounds and the production schedule—is the foundation of every process. Your customer gives you a date by which you are to produce and deliver your Orals. You allocate precious hours for every task and activity required by your process. Time and tasks go hand in hand towards the Orals goal. Yet within groups of people there are an infinite variety of concepts of time and they often overpower process.

What does COB mean? 5 PM? Midnight? The next morning? Who is going to be checking after COB that tasks have been completed? Who has a habit of showing up late? Do proposal managers start and end meetings on time? Wait for the late arrivals? Cancel at the last minute? All of these deviations from the formal schedule you built as part of the Orals process are caused by people. Process may be king and have the written timeline to show for it, but the people and their behavior with respect to time will overrule that schedule.

Allocating time according to the process doesn't take the "people factor" into account. How people prepare, teach themselves their oral content and how to deliver it, their need for private time for contemplation and coaching, requiring people to work their regular job and the Orals, and being expected to deal with continuous interruptions, are all "people factors" that impact time.

Your process can call for a color review or a practice at a certain time, but if the presenters aren't ready, that review or practice won't have any value. The process and schedule that doesn't include people time is a process that the people will overrule.

Sometimes you have too much time. The customer has delayed Orals, and your team is happy about the additional time. More time to edit and revise slides, meaning the final deck is delayed and delayed. More time to rehash speaking notes, meaning the presenters continue to be unsure about their oral content. More time to have additional reviews that bring more criticism that further frustrate the speakers. Thinking that more time is always a great gift is another way that people overrule the process. If the original schedule was deemed sufficient to achieve the desired outcome, then adding more tasks if there is more time overrules the process.

Individual Capabilities and Confidence

Assuming that you have selected the best individuals as Key Personnel, the Orals process is still impacted by the capabilities and confidence of those people. Excelling at the performance of the work of project management, for instance, is quite different from excelling as an Orals presenter. Sometimes your Key Personnel will be shy, lacking in confidence, or have had bad experiences in the past that make them timid speakers. I've also worked with Key Personnel who are so strong themselves that they intimidate the others on the team. Everyone needs some coaching and your Orals process should allow time and resources for that. But even then, some individuals will take longer to get where they

"...People and their behavior with respect to time will overrule the schedule."

need to be. You can't keep going until the speaking is improved no matter what your process requires.

One time, I worked with an exceptionally well-qualified person who was the proposed Program Manager for a huge bid. Working with him was like trying to catch the wind. He was often late for our coaching sessions, never prepared, and always blaming his other responsibilities. The more time I spent with him, the more I realized that he was just plain afraid of having to speak for a good 30 minutes out of the 120-minute Orals. He used his other obligations as an excuse for his lack of preparation, but it was the lack of preparation that was exacerbating his nervousness. Although intellectually he knew he was the right person for the job, he did not know this emotionally. No matter how terrific your process, you must anticipate that there are going to be some people whose emotions will overcome process. An excellent coach or advisor can help the individual deal with this but it will take time and your process will be overtaken until the person feels more confident.

Orals processes typically include assigning speaking parts based on roles. I've worked with people who were assigned certain parts of the Orals and struggled mightily to present credibly. No matter how many notes they wrote, or how much time I spent coaching them, they couldn't seem to transfer the content and quality from the practice to the rehearsal. Then in the course of the conversation they would express a desire to speak about another topic or set of slides because that's where they felt their sweet spot really is. Every time we made that change, the speaker in question went

from troubled to terrific. Not everyone can speak about everything—in fact most people can't do it well enough to get a high evaluation score. While making speaking assignments based on roles is typical, finding the sweet spot is an example of people overruling the process of speaking assignments and schedule.

Many people have told me that they feel more comfortable speaking to the customer, especially if they've been working with them for awhile, than they do speaking to the company's senior management during color reviews. So while your process includes color reviews and feedback, your Orals presenters will determine the real value of those reviews. They may fulfill the requirements of the process, but the value will be diminished because the discomfort of the speakers causes them to be stiff and boring, or block out criticism. You can meet the requirements of your process without increasing the quality of the Orals. Judicious revisions of your process, such as bringing in what the presenters perceive as friendly rather than critical internal audiences may help the Orals presenters gain confidence that they'll carry with them to the selection board.

Compliance

Your Orals process is intended to help the team be compliant as well as timely. You may include due dates for a compliance matrix and storyboards which allocate slides by topic, weight, and speaking time. Process is neutral, yet any number of people involved with the Orals can impact compliance negatively or positively.

Something as seemingly straight forward as the compliance matrix

is affected by the people creating it. One RFP had a long list of requirements in Section C and another formulation of requirements in Sections L & M. The capture manager created a compliance matrix based on Section C, with mapping to Sections L & M. Other team members believed the compliance matrix should have started with L & M and mapped C to L & M. It wasn't until this difference was ironed out that the team could go ahead with the storyboards.

One team's senior management was adamant that they had a solution far superior to what was asked for in the RFP. They knew it was non-compliant. They invested a lot of resources in making their case in the Orals. They were summarily rejected by the customer and the reason was non-compliance. If you have special recommendations you can try to make them, but only after you are fully and clearly compliant. This team's process was undermined by the decisions of the leadership.

“Make special recommendations only after you are fully and clearly compliant.”

Compliant doesn't have to mean boring or unimaginative. One team was required to show images of the two dozen or more components of their system, along with the specs of each component. The first draft of their deck included slide after slide of these images (essentially all black boxes with technology inside) and lists of the specs in tiny font.

They would be installing this system on military vehicles so we decided that the speaker—the chief engineer—would work with the graphics department to virtually install the system on a Humvee using a series of slides. By the time he had the system installed you could feel the heat of the engine and hear the sound of the siren in the system. There wasn't a bored person in the room. Then he showed several slides with the black boxes and specs and the selection board paid attention—because they had been so attracted by the installation. The speaker was compliant and innovative and earned a winning score.

Your process spells out the need to design and write slides, but it is people who are doing the designing and writing. Your people define what it means for the slides to be compliant and chose the look and feel, whether they're dense with detail or open and easy to understand. This choice impacts the oral content the presenters deliver. If ever there's a case when people rule over process, it is with each and every word spoken by the presenters.

Resources

Graphics talent, SMEs, and production resources are critical components of every Orals. Your process typically assumes these resources are available at specific times. Many Orals have been stalled because the resources weren't available at the times called for in the

schedule. In my experience, the most successful Orals have resulted when the people supplying the resources were an integral part of the scheduling process. Getting their buy-in and commitment early ensured that they were available at the times they were needed.

Collaborative online workspaces are a means to make progress according to the process. Every person on the Orals team should have access to that project's online workspace, and you should provide training on how to use it at kickoff so there is no doubt that it will be used. Capture and proposal managers must support the use of the shared workspace—no exceptions. If you have one, but it's not used consistently, it won't provide benefits.

Other decisions and actions made by people will support or overrule process. These include having a comfortable room for the Orals team, and administrative and support services such as lunch, refreshments, copies, and travel arrangements. Proposal managers and administrative staff who communicate clearly and completely via email or the calendaring features of your system ensure that smooth process is the norm.

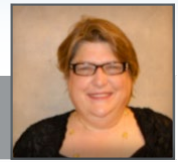
One company assigned a proposal support person to our effort. Among other duties, she ordered in lunch every day for 6 weeks; a variety of foods including many hot lunches. Each of the 25 people working on the Orals expressed their appreciation to

her. The lunches saved time by keeping people from leaving the building. However, in another, much more valuable way, they brought people together as they bantered and conversed personally over their meals. The final Orals reflected the congeniality and cohesiveness of the team. Their process, as excellent as it was, didn't provide this degree of cohesiveness. The people did.

People and process must go hand in hand to prepare and deliver an Orals presentation that earns a high score from the selection board. When you, the capture manager or business unit manager, recognize the variety of people factors and how they impact process, you'll be able to ensure that your Orals team takes your compliant and compelling solution to the selection board with confidence and the "wow" factors you work so hard to achieve.

Susan G. Trivers is President of Trivers Communications Group, a 12-year-old company that has served hundreds of Orals teams and supported thousands of speakers. She supports government contractors in earning a high score on their Orals presentations through the following: full life-cycle consulting from requirements definition to compliance matrix, storyboarding, slides, and color reviews; coaching the selected Orals presenters to compellingly deliver the company's distinctive competitive advantages to the source selection board. As competition for fewer government dollars increases, Susan helps her clients make a strong case to win every contract awarded.

New Member Profile



Beryl Hosack

Company	Independent Consultant, Solutions Architect and Capture/Proposal Manager
Professional Summary	A solutions architect with experience developing enterprise solutions for aerospace, defense, transportation, customs and border protection, food safety, manufacturing, and pharmaceuticals verticals. Beryl's technical expertise includes business analysis, system architecture, modeling, integration, SOA, and enterprise management. Examples of the solutions she has developed include a \$35M global acquisition system, \$40M international trade tracking system, and a \$100M aerospace modernization system. In addition to architecting solutions, Beryl is an experienced capture manager, proposal writer, and black hat contributor.
How did you originally hear about APMP?	A number of people whom I have tremendous professional respect for belong to APMP, and have been active in the organization. I was impressed by what I was hearing from them, and what I was reading on the APMP web site.
What do you hope to get out of membership and NCA affiliation?	I hope to meet professionals who are in the same line of work, expand my new business acquisition skills and certifications, and contribute some of my own experience to APMP's shared knowledge base.
What made you decide to join?	In February of this year, I decided to become an Independent Consultant in the support of proposal efforts. Clearly, joining APMP was an important step for me in this direction.
What is your biggest professional challenge/issue?	My immediate professional challenge is expanding my client base.
Fun Fact	I took a horseback riding trip in Iceland on an Icelandic pony named Pektar, which means "Bad Boy."

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

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What Makes a Successful Orals Presentation?

by Rosemary McDowell



Oral presentations are a major evaluation process for awarding government contracts. Many contractors, however, put Orals on the bottom of their list when it comes to proposal preparation. Those that do ultimately lose.

Orals are not a direct restatement of your proposal. Orals supplement your technical approach and usually require your key personnel as presenters, eliminating bait-and-switch syndrome. There are three parts to a successful orals presentation:

1. Slides
2. People
3. Final Presentation

The Slides

Orals must be prepared in conjunction with your written proposal with effective visuals that flow between the written proposal and the oral presentation. What constitutes an effective visual? An effective visual:

- Grabs the evaluators' attention
- Clearly communicates your information
- Presents a message that resonates with your customer

Avoid death by PowerPoint – the slides should not distract from your presentation. Rather, the slides lead your discussion. You want your evaluators to listen to you and use the slides as a reference point.

You need to emphasize your themes and discriminators. The slide input is from your writers and book managers. Use at least an 18-point font or larger, Times New Roman or Arial, only four bullets per slide, and capitalize only when necessary. Mike Parkinson, founder of Billion Dollar Graphics, advocates developing a process-based graphics solution to improve your win rates and increase efficiency.⁽¹⁾

¹ The Science of Proposal Graphics, Proposal Management, Fall/Winter 2010

Effective visuals help evaluators remember key messages!

The People

The RFP usually requires your key people to participate in the oral presentation. It is very important that they are involved throughout the RFP writing process so they:

- Know why those particular themes and discriminators are selected
- Develop an in-depth understanding of the solution
- Feel comfortable with the material

It is possible to transform a key person with the right qualifications into a powerful presenter. You need to help them develop the attitude to WIN! I use a three-step process when working with Orals presenters – understand, practice, and refine!

First, all the presenters must understand what Orals are about – the ground rules and expectations. Both experienced and new presenters need an overview of that particular solicitation's Orals requirements and the message being delivered. Knowledge of the material ensures a confident presenter!

Second, practice, practice, and practice! Many Orals coaches advocate scripting. If your presenter is involved throughout the RFP process, scripting is kept to a minimum. The more you practice, the more comfortable you are with the material, and that shows through your body language. Many times, we forget that over 50% of the communications package that we

deliver is body language! There are three components to practice:

1. Practice using a video camera or recorder
2. Practice in front of a friend/family member
3. Red Team

All presenters need to practice their material. If you listen to or see your presentation and are bored, chances are good your audience is too. The same is true when practicing in front of friend. It is amazing the number of presenters who come to me the next day after practicing at home and states their spouse had several great ideas to improve their presentation.

The Orals Red Team is the dress rehearsal. I prefer having upper management who knows the customer to participate in the review team. It is also the perfect opportunity to practice the Question and Answer session. Before the review, I always ask the writers and management for client questions that are not specifically covered in the proposal – adding an element of surprise to your presenters and seeing how they react. The Red Team permits presenters to learn from their mistakes, so that the actual presentation is:

1. More responsive to the informational needs of the audience
2. Answers are developed for likely questions to be asked
3. Overall speaking confidence and competence are enhanced

Knowing as much as you can about the room where you will present will help make your presenters more comfortable and confident! Several

years ago, I participated in an Orals presentation where all the evaluators were sitting behind computer screens! The only person making eye contact was one person in the back with headphones. We later found out he was the technician. But try to imagine facing screens, not people! That is why it is important to listen to yourself and inject feeling into your words. If you give a 100% scripted monotone presentation, you will lose your audience and lose the contract.

Third, refine the message, delivery, and impact. Each presenter has their own style – it is up to the Orals coach to balance personalities, messages, and delivery styles. Perhaps most importantly, address the Questions and Answers portion of the presentation. Presenters often make the fatal mistake of taking too long to answer a question – keep the answer concise and to the point! Simple yes or no answers are acceptable.

Conclusion

A great Orals presentation can take a good technical proposal and raise it to excellent. Several years ago, I was the

Orals coach for a billion-dollar RFP. I started on the project on Day One and worked side-by-side with the proposal team. I developed the slides using the proposal graphics, but added themes and discriminators that were missing from the written proposal. After winning the contract, we found out that our written proposal was only third technically. Our Orals presentation won the contract!

“Presenters often make the fatal mistake of taking too long to answer a question.”

Following the steps above has always ensured a great presentation for my clients. Always remember, your last impression is the most memorable – and your Orals are the last contact with your client before contract award!

Rosemary McDowell is a successful entrepreneur with over 25 years of experience in government and industry. It is this combination of experience that assures her clients the best possible service. She supported Government acquisitions for both large and small businesses successfully: winning over \$4B in government contracts in the past 5 years; increasing client revenues from 20% to 500% from 1995 to present; maintaining 85% win rate vs. 40% industry standard since 1990. Ms. McDowell presents numerous workshops and seminars on Government contracting to local, national, and international groups, and receives numerous awards for her work. Her war stories from actual experiences keep her audiences engaged, and her how-to and how-not-to fully prepare you for the unexpected in working with the government. Rosemary is the author of “Demystifying Government Contracting”, and co-author of “Fearless Women, Fearless Wisdom”, and the #1 best seller, “Fight for Your Dreams, The Power of Never Giving Up.” Rosemary demystifies the government procurement process with keynotes, seminars and workshops based on her hands-on experience as a contracting officer responsible for over \$4 billion annually, and as a successful entrepreneur advising sole proprietors to Fortune 50 businesses on working with the government. Contact: rmcdowell@rosemarymcdowell.com; www.rosemarymcdowell.com; 703-691-2392.



7 Steps to an Easier Interview

by Tracy Argandona



I work very long hours with proposal teams who often aren't right next to me in a war room during the proposal prep. Preparing for an interview can be one of the most rewarding parts of my job. Here are some tips for streamlining the interview process so that it can be enjoyable for everyone.

#1 Prepare early—starting with the RFP or before. If you know or suspect that the competition will include a formal presentation, it's never too early to think about an interview. Who will best sell your team to the client? Make sure they are in a key position on the org chart—or at least in a position where there is a logical reason to include them in the interview. Are you relying on a subcontractor for a key position? Make sure they are exclusive, or at the very least, they won't show up at anyone else's presentation, and get that written into your teaming agreement. Will you present a model or other type of demonstration? Make sure you start development early enough so that it's ready for the interview. Start well before the proposal deadline so

that you can include screen captures and enough of a description in your proposal to spark the client's interest.

#2 Revisit your plan once you are officially invited to interview. Keep it about the client—and follow any and all instructions you get from them. How many times have you prepared a presentation around the evaluation factors, or the proposal outline, or your win themes, and then received a very specific list of questions from the client to be answered during the interview? That's not an unusual situation, but it's not usually difficult to work the points that you want to make into what the client wants to hear. For example, if one of your win themes is focused on your project manager's experience leading the only comparable program, you can weave that into an answer to a question about the management approach or the team organization. If one of your win themes is about your experience developing a particular type of software or tool, you can incorporate that as a proof of your capability during your discussion of the approach.

Don't venture too far off track, or you might be called on it. Have you ever had to work with an interview team who, despite all of your advice and warnings to the contrary, chooses to disregard the questions and follows its pre-conceived plan, regardless of the client's instructions? I have, and it wasn't pretty—within the first 30 seconds of the presentation, when the client realized their agenda was not going to be followed, they ordered the presenters to stop, and only address the questions they had provided. There is no way to recover from that! The partner in charge came off as arrogant and difficult to work with, the rest of the interview team became extremely uncomfortable and bombed, and the company lost the bid.

#3 Remember that interview instructions and evaluation factors may be included in the RFP, in addition to the letter inviting you for a presentation. It is not unusual for several months to pass after a proposal is submitted until the government holds interviews, and it's easy to forget what was in the RFP during that time. Always go back to the RFP—often state or local agencies will include specific evaluation factors for the interview, or will address how the interview affects the final score (i.e., will the interview score be cumulative with the proposal, or will everyone who has been invited to present start from a blank slate?) When in doubt about what the client wants to be covered in the interview, ask. Sometimes invitations to interview are extremely vague—it doesn't hurt to ask the client for more direc-

tion, the worst they can tell you is that they can't tell you any more than they have. Other times they may provide very revealing answers, including the identities of your competition.

#4 Make sure your interview team is a team. These days, many of us are preparing for an interview for a large, nationwide contract, or for task orders in far-away places, or with a team from offices in various cities or countries. Often, not every person on the interview team will know each other. Do not underestimate the effect that the team dynamic can have on the client's overall impression. It is usually obvious from the team's interaction if the project manager has not met their key team members until they flew in on the morning of the presentation. Even booking rooms at the same hotel so that your speakers can have a meal or a drink together can increase camaraderie, and that shows.

Do everything you can to make your team a true team—starting with the proposal ideally—so that each presenter will have actually contributed to the technical approach or staffing plan, or participated in past performance. When that isn't possible, at the very least the interview team needs a solid 48 hours together to rehearse. In addition to rehearsing their own roles separately, each person should be part of a group practice session on answering questions—which person will field which questions, how many people are too many to answer, and whether the PM will direct the answers or if specific staff can speak up without the PM serving as the traffic cop. A deputy PM who jumps ahead of the PM to answer all of the management questions during

the Q&A session might make the PM look like they can't manage their team. On the other hand, a PM who doesn't know how to answer a technical question needs to know which of their team members can, and how to direct the question accordingly.

#5 If you have the option to bring someone to the interview just to handle equipment or IT, do it. Your interview team should be focused on greeting the client, if allowed, and thinking about their presentations, not laptop setup. Your extra person can also handle any last minute logistics such as getting a spare projector, handling transportation, or finding water for the speakers (but don't bring in bottled water to a municipal water utility—they may be offended by the apparent lack of faith in the purity of their product). If you have a break during the Q&A session, the tech person may be able to help coordinate additional questions to be addressed. If the equipment is not complicated, bring someone from your marketing team who was involved in the proposal or interview prep. They will have a vested interest in seeing the team succeed, and they will benefit from the experience of watching an interview and Q&A session.

#6 Compliment and praise your team, especially on the final day before the presentation. Above all, the presenters need to convey confidence in their approach, in their team, and in themselves. Minimize any last minute changes and recommendations to those that are most critical to winning over the selection committee. Make sure you compliment your presenters on what they are doing well—everyone can benefit

from positive feedback. Showing your confidence in the presenters will help increase the confidence of those who need it.

#7 Get feedback. It can be very difficult to round up an interview team comprising people from various offices, since people often want to rush to the airport or drive home, or run back to the office and catch up. Let people know before they make their travel plans that a debrief will be held after the presentation. If the interview site is too far from the nearest office, you can have it elsewhere, but if you meet in an empty room at the client site, in a hotel ballroom, or nearby coffee shop, just make sure your competitors who are going on next aren't nearby to hear you talk about it. Document your lessons learned, and share within your organization as needed to help make the next interview even better.



... That's what I do to my proposal team members who miss deadlines. LOL.

Tracy Cain Argandona has 13 years of experience with proposals, marketing and communications, primarily for A/E companies serving Federal clients. She manages AECOM's east coast proposal team in Alexandria, VA, and is responsible for large and strategic Federal pursuits. She has a BA from Georgetown University and is working on her questionnaire for her first APMP certification.

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Oral Presentations

by Shlomo Katz



Once quite unusual, oral presentations are now common in Federal Government procurements. Naturally, like other aspects of the procurement process, oral presentations raise their share of legal questions. To help you better prepare for, and take advantage of future oral presentations, this article will survey some of the Government Accountability Office (“GAO”) bid protest decisions in which issues arising from orals played a significant part.

The Federal Acquisition Regulation (“FAR”) explains that: “Oral presentations by offerors as requested by the Government may substitute for, or augment, written information.”⁽¹⁾ And, the FAR sets out some basic principles regarding orals. It says:

Use of oral presentations as a substitute for portions of a proposal can be effective in streamlining the source selection process. Oral presen-

tations may occur at any time in the acquisition process, and are subject to the same restrictions as written information, regarding timing and content. Oral presentations provide an opportunity for dialogue among the parties. Pre-recorded videotaped presentations that lack real-time interactive dialogue are not considered oral presentations for the purposes of this section, although they may be included in offeror submissions, when appropriate.⁽²⁾

Still, as is the case with so many FAR provisions, additional guidance relating to procedures for and best practices regarding orals must be gleaned from GAO’s bid protest decisions.

Recording Oral Presentations

– It is a best practice for the Government to record oral presentations. This protects both the Government and offerors in the event that disputes later

arise about what was actually said. In Resource Dimensions, LLC⁽³⁾, the Government did record the presentation, but it did not record the Q&A session afterward. Instead, the contract specialist took notes. The offeror disputed the accuracy of those notes, and eventually a consensus was reached about what the questions and answers actually were. However, the Technical Evaluation Panel members apparently were not informed of the consensus notes and instead relied on the original version. As a result, the offeror’s protest was granted.

There are several lessons here: First, offerors should designate a member of their team to keep notes of the presentation. Second, you should inquire how the customer intends to memorialize the orals and you should ask for a copy of the recording, notes, etc. Finally, if the Government refuses to provide a copy, then, if a protest becomes necessary, be sure to tell your

attorney about the existence of recordings or notes so that the attorney will know to request them from the agency in the protest proceedings.

“Orals matter. The Government is not holding them just for a chance to shake your hand.”

Oral Presentations As An Evaluation Factor – In *Brooks Range Contract Services, Inc.*⁽⁴⁾, the protestor asserted that the selection decision was unreasonable because it was based in part on consideration of the oral presentations. The protestor claimed that, because the oral presentations were not listed in the RFQ as an evaluation factor, it was improper for the agency to include the presentations in the evaluation. GAO disagreed, however. While the protestor was correct that the solicitation did not include the oral presentations as a separate evaluation factor, such an express designation was not required. Vendors were specifically advised that the oral presentation would become part of the quotation package, and the solicitation specified that oral presentations were to cover information related to performance of the contract. Therefore, it was implicit that the information presented would be considered in the selection decision.

The most important lesson here is that orals matter. One wonders if the

protestor in that case did a less than stellar job on its oral presentation because it did not think the presentation counted. Don't make that mistake; the Government is not holding orals just for a chance to shake your hand.

Orals As Discussions – Two contrasting cases involving oral presentations highlight the important point that the Government must treat all offerors equally. This includes holding discussions with all offerors in the competitive range if discussions are held with any.

In *Sierra Military Health Services, Inc.*⁽⁵⁾, the protestor complained that the agency had held discussions with only one offeror and allowed that offeror to submit proposal revisions following its oral presentation. GAO ruled that agency's communications with the awardee during oral presentation did not constitute discussions, and the agency was not required to conduct discussions with and request revised proposals from all offerors in the competitive range. Rather, the information furnished by the awardee after oral presentation in response to agency questions was merely a clarification of information previously furnished by the awardee in its presentation slides and the accompanying oral presentation of the slides.

In contrast, in *Global Analytic Information Technology Services, Inc.*⁽⁶⁾, GAO held that the agency improperly engaged in discussions with the awardee while not holding discussions with other offerors. In this case, the awardee was permitted to submit the required price escalation rate after the conclusion of its oral

presentation, notwithstanding the agency's specific instructions that such pricing information had to be furnished at the outset of the oral presentation.

What do these cases mean for you? Offerors often go into orals hoping to gain more insight into what it will take to win the procurement. Sometimes, offerors are disappointed because the Government team says nothing and asks no questions. Other times, a lively give-and-take occurs. Such a conversation can help you submit a better revised proposal, if you are given that chance. But be careful! The last thing you want is for the Government to talk so much that it is forced into requesting revised proposals from all offerors when it had been planning to award to you based on your initial proposal and oral presentation.

1. FAR § 15.102(a).
2. *Id.*
3. B-404536, 2011 CPD ¶ 50.
4. B-401231, 2009 CPD ¶ 129.
5. B-292780, 2004 CPD ¶ 55.
6. B-298840.2, 2007 CPD ¶ 57.

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