



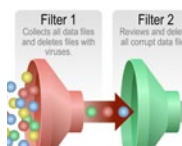
EXECUTIVE summary

Fall 2012 | Volume 19, Issue 4

This Issue's Theme: **Developing A Winning Solution For Your Proposal**

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What Do Aerobatics Have To Do With Business Development Organizations?

by Olessia Smotrova-Taylor

I used to be so scared of flying that I would sit on a plane and breathe in a bag to deal with the anxiety attacks. I forced myself to travel for business, but each flight was such a high-stress event that I would feel depleted, as if I had run a marathon. I felt as if I had to hold the plane in the air by sheer willpower the entire flight.

A little while ago, however, I started venturing out to shake things up a bit. I have heard that when people approach 40, they realize that life is not a dress rehearsal. This knowledge has become more than just an intellectual understanding to me. I have done all kinds of things as my 40th birthday approaches – from climbing in tree tops, training in tactical driving, shooting machine guns, and storming a building, to riding my first rollercoaster in Busch Gardens this August. My desire to push the envelope started out as a mind over matter thing that I do a lot to push through 18-hour work days. It morphed into curiosity as to how the subject matter experts I work with in government proposals do their jobs, and then grew into a desire to step out of a daily mold. Finally, it all turned into the ardent desire to live my life to the fullest.

Flying was a tough one, though. I did get a lot better as over the years by using online courses and pep-talks from anyone who didn't suffer from the same phobia in order to learn their techniques and cure myself of the fear, but it only took me so far.



Last week I went to Reno to offer our course, Business Development for Project Personnel, to one of our customers, Tactical Air Support, Inc. (TacAir – <http://tacticalairsupport.com/tawp/>). TacAir provides their customers with military aviation experts, including TOPGUNS, former Fighter Weapons School commanders, and test pilots. They are elite warriors on par with the Navy SEALs, but specialize in flying – they train military forces in the U.S. and allied countries in operationally



current advanced flight training, tactics development and evaluation, etc. TacAir was the first western commercial company trained to maintain and operate the Ukrainian SU-27, a twin-engine super-maneuverable fighter aircraft that they ultimately imported to the U.S.

.....
: ...how the subject matter experts
: in government proposals do their
: jobs and then grew into a desire
: to step out of a daily mold?
:

Training super-bright students is always rewarding, but the setting for this training mission turned out to be simply unbelievable. The hotel-casino where I was staying was as noisy as a beehive with the arrival of desert dust-covered Burning Man crowds. They were still in their costumes, smelling of cannabis and booze, and high on life and assorted stimulants. At the epicenter of an After-Burn party, I didn't get much sleep from the noise. However, I did encounter a slew of characters, including a guy in a peacock hat and a silvery trench coat (with apparently nothing under) who flashed me as I walked by. Not too far from the hotel was a Great Reno Balloon Race, with a mesmerizing display of colors and patterns. The Tailhook Convention, a famous event where naval aviators and the supporting industry network over beer, wine, and flying toy

monkeys, topped off the week. All of it was going on as the Stead Airfield near the TacAir offices was filling up with colorful airplanes for the insanely dangerous, but exhilarating National Championship Air Races.



The highlight of the trip, however, came on a sunny morning when former TOPGUN

Commander Gerry Gallop (“Spud”) took me up in an Embraer 314 Super Tucano, an attack airplane built for counter insurgency (COIN) warfare and Close Air Support (CAS). It has all of the sophistication of a new F-16, but the fuel economy of a turbo prop. This powerful plane, able to pull 7 Gs, is used primarily to support ground forces and even carries a sensor just like the one on Predator UAVs. TacAir is the only commercial company that operates the Super Tucano, so this was a unique treat.

So, with all my fear of flying and even rollercoasters, here I was, climbing into a cockpit and getting strapped into an ejection seat to do some aerobatics. The type of stuff that I am scared to even watch, let alone partake in. There was excitement, but zero fear. No, scratch that. The only worry was that I was going to toss my cookies, as I was told by others this was a real possibility with all the spinning.

In my helmet, I heard all kinds of voices – the pilot, the tower, and the

plane itself. The plane spoke in a rather sensuous female voice with a slight (Brazilian?) accent. It kept saying *Danger... Danger... Warning... Oxy-gen*. Mind you, it was before the take-off, but I could care less what she said at that point – I was too eager to be airborne and trusted that Gerry would figure out what the plane was fussing about. I also amused myself with the mental social commentary running through my head, working out exactly why one would give female voices to fighter planes.

Finally, we did a maximum performance takeoff. It was simply beautiful over northern Nevada with the balloons in the air at a distance, and very clear. It was too bad you could not quite see all the way to the Black Rock desert and the Burning Man site, where the cleanup crews were beginning their arduous job after the mega-party.

I took over the controls and felt just how unbelievably maneuverable and responsive the plane was to the touch. No wonder after you fly for a while, the plane becomes an extension of the pilot. When Gerry



took back over, we did some fighter maneuvering at G-loads. It was a new feeling hard to describe, other than my spine being compressed hard and my insides wrung and pulled down. I instinctively focused on breathing at that point, keeping my muscles tense and ears level with my shoulders, enjoying the blue sky and sunshine in the glass canopy.

We then went on to do aerobatics, including a barrel roll where the plane went upside down, and a wingover where I felt nearly weightless. I gather the plane rapidly lost altitude at that point. I honestly could not tell where the plane was in relation to the ground or sky or what it was doing – except it was the wildest ride, and I wish someone had filmed it from the ground.



The next part was equally as exhilarating. We headed to the mountains to simulate a low-level reconnaissance and attack mission. The airplane zoomed nimbly close to the ground at about 250 mph so you could see every bit of detail – the insurgents wouldn't be able to hide, had there been any in the Nevada mountains.

We then climbed back up for the tower to clear us for the overhead “break,” the normal military arrival procedure for high-performance aircraft. After a quick trip around the landing pattern, we touched down and taxied to the TacAir hangar at the end of what was quickly becoming Pit Row for the Air Race week. I was full of adrenaline and not one bit queasy – I guess I won the genetic roulette where it comes to my G-load tolerance. I not only had the time of my life, but I also kept my dignity intact!

I reflected on why this was such a positive experience as opposed to my usual apprehension regarding flying. There I was in the plane, feeling safer than sitting at a desk writing this article. I believe it was all about trust. Trust in the professionalism of the TOPGUN-trained pilots. Trust that Gerry's expertise is consistent with the culture of excellence I had observed at TacAir.

Trust is a relatively rare feeling for me. What about you? Think about it – in Business Development – and around your workplace, how many people do you have around you with whom you can

trust your life and not worry about triple-checking everything they do because you are certain they will handle everything with the utmost care? Wouldn't you enjoy working alongside highly trained professionals who can see the big picture, but also pay keen attention to detail? Who are perfectionists and have the stamina to push themselves hard? Who put everything they have into winning a pursuit – and their only reason for not getting something done right would be if they were in a hospital or dead?



I had an epiphany on this trip about building high-performance organizations. In a regular organization a Pareto principle applies: 80 percent of all work is done by 20 percent of

all people. If you are one of these 20-percenters, you know that you will work 10 times as hard and burn the midnight oil, while worrying about asking too much of others, respecting their rights to have time with their family and to lead a balanced life. But what if you had mostly the top performers around you? What if you didn't have to compensate for others' shortfalls? What if you didn't have to worry, triple-check, and over-manage? Could you have a more balanced life yourself? Could you accomplish even more? Would you have a lot more fun doing what you do?

Why was this such a positive experience...?

It was all about trust.

So, take a look around at those who are doing business development, capture, and proposals with you. And the subject matter experts who contribute to solution development. Do you need to reexamine what roles people play in your organization? Do you need to encourage some to step up and take on more responsibility (perhaps in exchange for greater rewards) so that they could work to their full capacity? So be it that they may have day jobs on billable projects – if you properly reward them, they will be there for your capture and proposal team, investing their time into developing solutions alongside with you, burning the midnight oil. Take a look – do some of these people require training and development?

Interestingly, proposals also tend to expose those who don't like to work hard. Check if they are doing stellar jobs on their projects – or they are just phoning it in – just like they did on your proposal. Does your organization need to let go of those who don't deliver – and maybe even point that out to their management?

And then, turn to the mirror, which is highly advisable to do periodically as you look around. Are there areas of self-improvement for yourself where you could draw inspiration

from professionals like those that I got to meet at TacAir, who are true masters at what they do? Do you need to take training – so that you are a master CONOPS facilitator – and you

can teach those around you how to develop great solutions? Who are your role models that inspire you to work even harder, to feel more alive, to push further, and strive to be a better you?

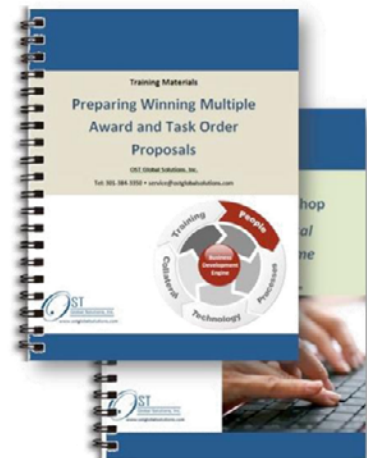
The president of OST Global Solutions, Olessia Smotrova-Taylor, has 17 years of experience in business development, communications, and marketing. She makes it her goal to stay current with the best practices in winning proposals, and collaboration tools and techniques that help build fully integrated proposal teams. She also serves as a fellow of the Association of Proposal Management Professionals and the President of the National Capital Area Chapter (APMP-NCA), and had been the APMP-NCA Executive Summary eZine Chair from 2008 to 2011. Prior to supporting a number of Fortune 500 companies and small businesses as a proposal consultant, she worked as a business developer for Raytheon and Lockheed Martin, and wrote for the Financial Times of London. Olessia regularly develops and teaches capture and proposal workshops and seminars (upcoming classes: www.ostglobalsolutions.com/training/schedule). Olessia can be reached at otaylor@ostglobalsolutions.com or at 301-384-3350.

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Ask the Graphics Guru

What Are InfoGraphics And Should I Use Them In My Proposals?

by Mike Parkinson

An infographic is any graphic that clarifies or explains. Therefore, since a proposal describes your solution and graphics are remembered and understood more easily than text alone, you certainly want to use infographics in your proposals to maximize your chances for success.

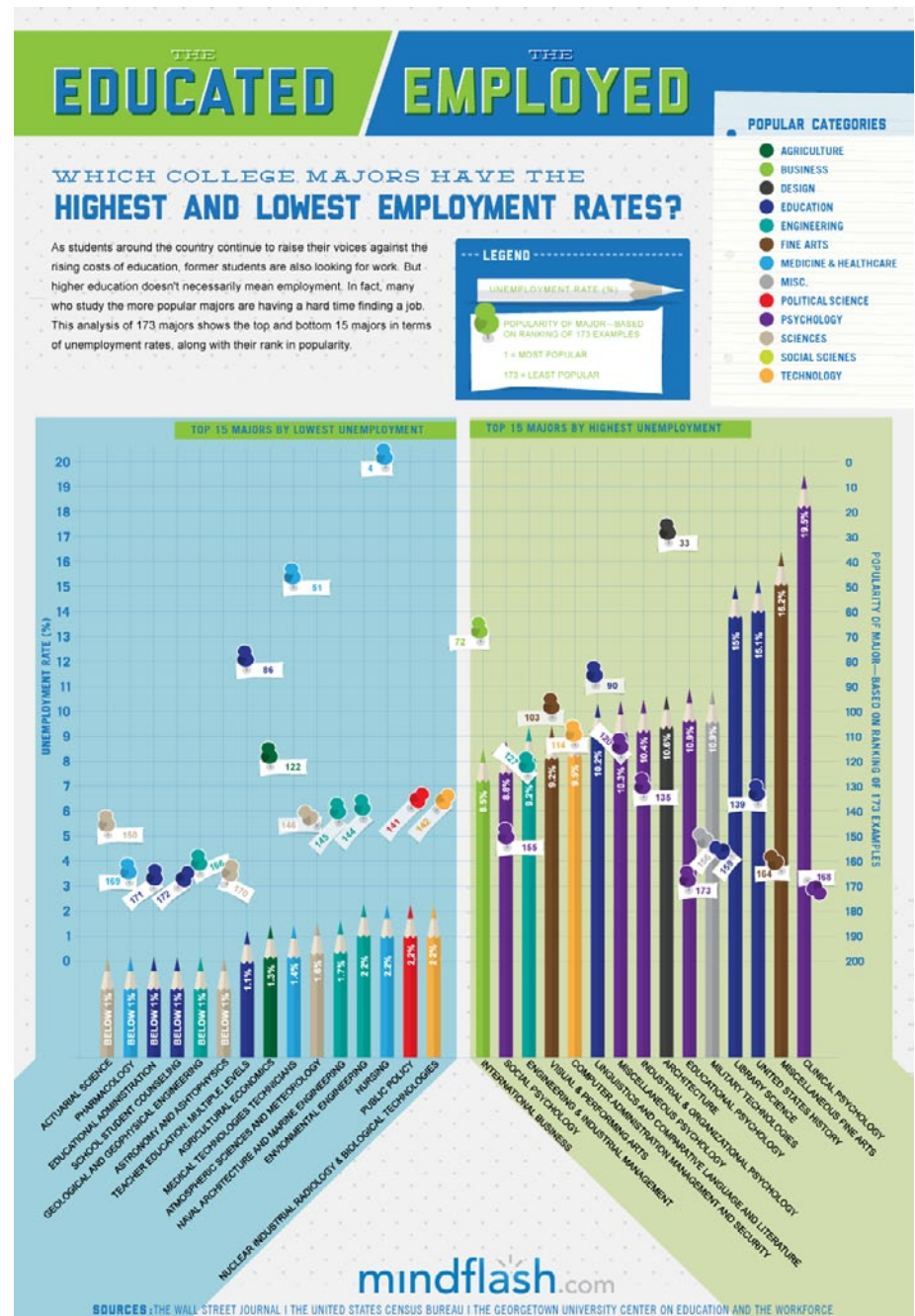
Infographics can be objective or subjective. There are no rules that require infographics to be devoid of opinion or the desire to influence. Search Google Images for “political infographics” or “charity infographics.” Many of the resulting graphics present information consistent with the creator’s agenda. The creators of these infographics know the power of visual communication and use it to bolster their cause. (Presenting misleading information in an infographic results in a spectrum of negative consequences. Never lie.)

Good visual communication is viewed positively by potential clients and is expected in our competitive marketplace. A well-designed graphic helps the evaluator comprehend and recall the information shared within it while communicating less tangible benefits like professionalism and trustworthiness. However, as the world embraces visual communication (infographics) more and more, we are seeing missteps. The biggest error stems from the fact that we misunderstand the definition of an infographic.

The Error: Misunderstanding what an infographic is.

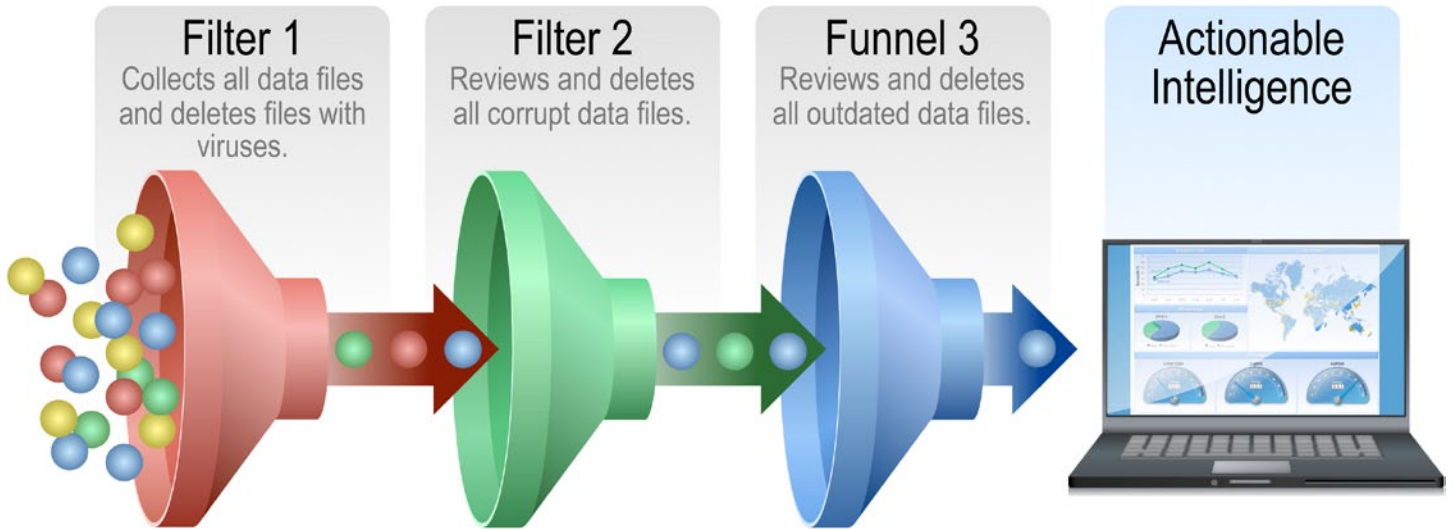
The paradigm is to assume that an infographic is a complex, often visually appealing, diagram. If you are asked to picture an infographic what would you picture?

1. I suspect an image similar to the following may come to mind:



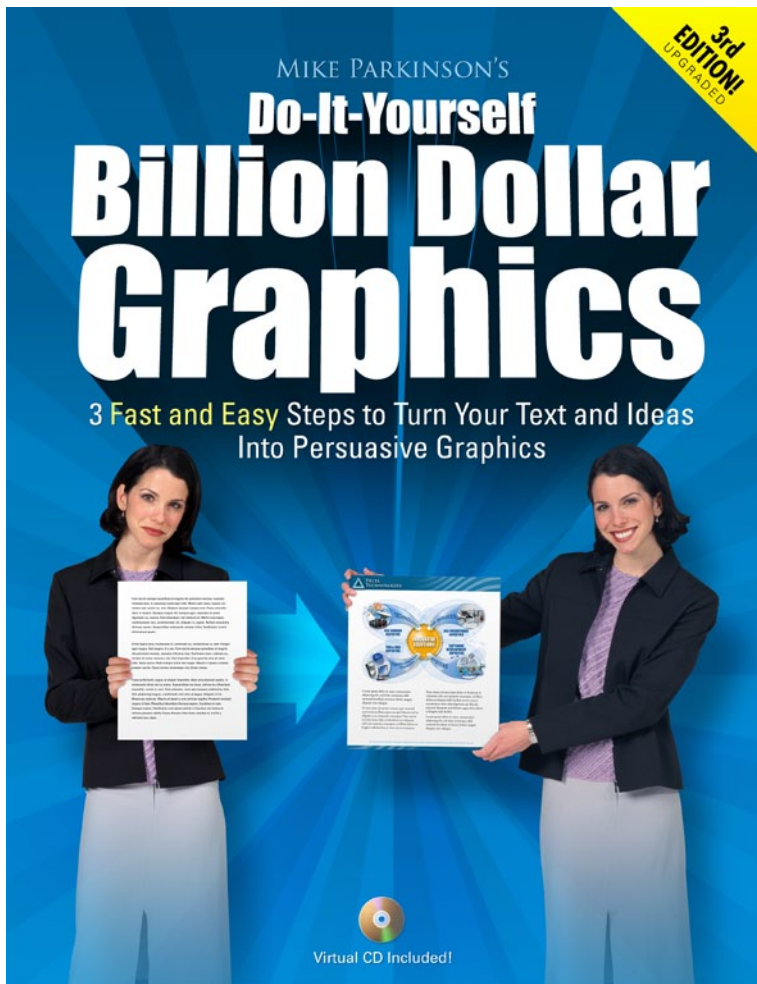
Courtesy of mindflash.com.

2. Or you may picture a simpler graphic:



Courtesy of GetMyGraphic.com.

3. The previous two graphics are absolutely infographics, and so is this book cover graphic:



It may surprise you that a book cover (image 3) could be an infographic. If you define an infographic as any graphic that clarifies or explains, then all three qualify. The first graphic *explains* which college majors have the highest and lowest employment rates. The funnel graphic (image 2) *explains* the filtering steps for intelligence gathering software. Lastly, the book cover graphic *clarifies* the content and purpose of the book. All of the elements on the cover (text and graphics) communicate that this book will help readers transform their text into “billion dollar graphics.” The woman is holding sample pages of her document before and after application of the process shown in the book—a visual example of tangible benefits (learn to turn text into great graphics). Her facial expressions of sad to happy communicate intangible benefits (it’s easy and you will be happier with the results).

The need for book covers, proposal covers, advertisements, and other marketing images to clarify or explain messages is often overlooked, and result in bad covers, ads, and marketing materials. Applying the same strict infographic standards (i.e., clear communication of the primary message) to all graphics **with a goal to clarify or explain** will result

What Are InfoGraphics And Should I Use Them In My Proposals

in greater success. If a design element is not intended to clarify or explain, then there is no reason to adhere to infographic standards.

The Fix: Redefine what an infographic is. Infographics are more than diagrams. To improve our success rate, we should define an infographic as any graphic that clarifies or explains. In other words, if the intent is to educate, the graphic should be seen as an infographic. This definition forces us to hold more graphics to a higher standard. The following illustrates why redefining infographics increases win rates:

I polled proposal professionals and asked, “*Have you regretted buying a book based on the cover art?*” The majority replied that they had been misled to buy a book, because the cover did not match the content. Book buyers *expect* the book cover to educate them on the subject matter of the book. If it fails to do so, the buyer’s expectations are misaligned with the book’s content, which results

in frustration, disappointment and distrust. If the designer had viewed the book cover as an infographic, they would have created the cover to be more consistent with the content and created fewer aggravated readers. *Just like proposal covers!*

Many proposal covers will benefit from the rigorous standards placed on infographics; therefore, when appropriate, a proposal cover can and should be an infographic. For example, my client was proposing a new collaboration system. By polling the proposal evaluators, we determined they cared most about the answers to these two questions:

- Who can collaborate?
- How does it work?

We designed our cover to show three types of collaborators working together via a web-based user interface. The user interface clearly displayed the type of data available. On a map in the background, I linked the locations from which data was gathered into the

user interface. Before even reading the proposal, the evaluator had an idea of who can use the interface and how it will work, receiving a visual overview of our proposal content and answering their two most important questions. We won the proposal. Though I know the win was a combination of content and interior graphics, we held the cover to the same standards as the infographics within the proposal, and I have no doubt it aided in our win.

If a graphic is meant to educate (clarify or explain) consider it to be an infographic, and challenge your team to better visually communicate your message.

Mike Parkinson PPF.APMP 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. Mike Parkinson can be reached at mike@24hrco.com or call 703-533-7209.

Note From the E-Zine Chair and Chief Editor, Julia Pochekueva

Please take a few minutes and let us know:

- What keeps you up at night as a proposal professional?
- What article and tips would you like to see in this executive summary?

Our executive summary team would be happy to get your feedback. We can be reached at jpochekueva@ostglobalsolutions.com or at 301-384-3350.



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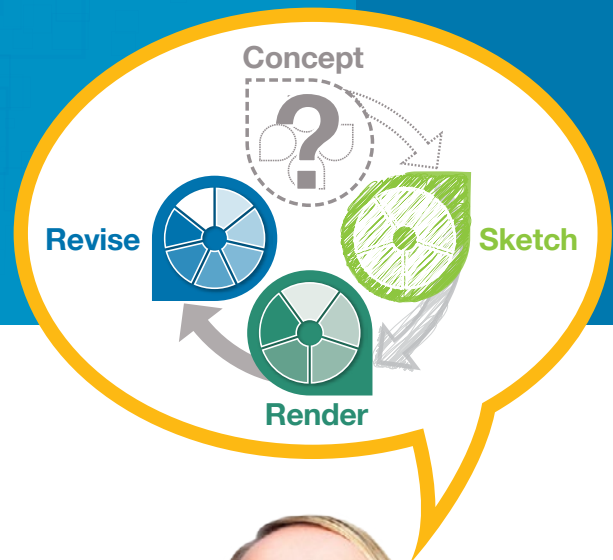
Having your correct contact information makes it easier for the NCA Chapter to keep you informed on upcoming events and activities.



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What Are My Winning Proposal Secrets? I'll Never Tell!

by Matthew Kelley

How do you develop a winning solution for your proposal? If I were cornered by this question, I'd stall and change the subject as long as possible, waiting for a contracting office mulling one of my bids to make an award decision. Then, when my interrogator was just about to turn the screws on me, I'd shove the award notice in their face and declare, "*That's how! Boom!*"

I can tell you the win factors for the successful proposals I've worked on in the past, but nearly all of them are particular to those opportunities. I wouldn't even necessarily repeat those strategies for my own future proposal efforts, let alone suggest someone else follow them. Of course there are always building blocks of content from one bid to another, and when you bid on similar work over and over again, your proposed approach is going to be similar too. But boilerplate and standard approaches aren't the secrets to success that proposal professionals need. My company wins on our strengths and experiences, which are not secrets. However, applying those to the next project is a big factor in whether we win that work or not.

You have to do the same thing for your proposals—*identify your unique strengths and combine those with a reasonable technical approach and a competitive price*. You have to identify your strengths as relevant to the work.



You have to hone your descriptions of your tried and true processes. But you should already know that, and if not, welcome to Phase 1. Beyond that advice, considering that most of you reading this are potential competitors, I can't give you any secrets to winning. I wouldn't want to make it any easier for you even if I could! I want you to wander thirsty in a desert of losing bids and proposals, while I splash in a private oasis of strategic wins.

Even though I can't tell you how to win (and don't want to), I can poke holes in the most common win themes I hear at proposal kickoffs: "Great Team", "Low-risk Technical Approach", and "Low Price". I think these are **hollow win themes**; they're the basic assumption of any bid, and they're typically forgotten the minute the kickoff conference line breaks.

Great Team

In your Executive Summary you'll introduce your company as some kind of "leading" something or other. You'll list out your awards and recognition and fill in any other corporate information that's a requirement for the bid – socio-economic status, quality certification, etc. You're going to paint your company as a white knight competing against an incompetent horde of businesses. Then you'll insert your first win theme, highlighting the excellent team you've built. I think this is fine to do, but it's not a win theme because:

- You started out by professing that your company is a superbly qualified, leading something or other, and then you'll tell the evaluator how Teammate A fills your lack of experience with a key technology,



Teammate B gives you an ability to provide staff, and Teammate C is the only one who knows the customer's needs. So the government should choose you... the single best four-headed monster in the land?

- You must assume that all prime bidders either have the requisite qualifications, or have teamed to fill their gaps just like you. So after your standard Executive Summary section you're equal.
- I rarely see follow-through relating the value of a particular team to the evaluation factors of an RFP. Why is your four-headed monster team better for the customer than a lone qualified bidder? If I were a customer I'd prefer a single entity over a hodgepodge of corporations designed to check the box on my evaluation.
- Strength of team isn't a typical evaluation factor. Maybe it's an X-factor, but not something

directly scored. What is a win theme that doesn't tie to an evaluation factor?

Low-Risk Technical Approach

When I hear this win theme, the first thing I want to do is find out why we're so sure of this. In particular, I want answers when bidding on a sustainment contract, where the work, the technologies, and tools are all mandated by the solicitation. I want to know what we're doing that's so different and great, because that's where a real win theme might lay. Without drilling down to the how and why, "low-risk technical approach" is a bad win theme because:

- You're basically asserting your ability to carry out the same SOW as the next bidder.
- The only way to validly claim a low or lowest risk, is to be a favored incumbent, but that's a different win theme. Otherwise your approach may be better, more innovative, and capture the

customer's attention, but being different makes it absolutely risky.

- How do you quantify your low-risk in comparison to your competitors? Do you really think they're going to paint themselves as high-risk? Everyone is going to claim to be low-risk and be able to basically back that up, assuming they're qualified to do the work.

But unless your low-risk claim is rooted in your proven incumbency on that program, you need to find actual technical differentiators for your win themes.

Low-Price

Even when win theme ideas are hard to come by, there is always one that can be scrawled onto the war room white board: "Low price." There, I've said it; the secret to winning bids is to have the lowest price. Don't repeat this information above a whisper, lest your competition catches wind and also tries to submit a lowest-price bid. Or maybe knowing you're taking that route, they'll be able to black hat you with an outrageously high price, or maybe not. Maybe low price isn't a win theme because:

- It's the goal of any proposal to provide the best price possible to support the work. Low price is a proposal best practice, not a win theme or differentiator. If you have something that allows you to be clearly lower than other bidders, that something is your win theme.
- Going low for the sake of low isn't a winning strategy. You

What Are My Winning Proposal Secrets? I'll Never Tell

Low price is a proposal best practice, not a win theme or differentiator.

could easily show that you don't understand the work by bidding unreasonably low. Also, if you win a contract that you've underbid and lose money doing the work, then you've actually lost in the big picture.

- Squeezing down to meet a low-price win theme increases your risk of technical solution delivery,

and it hurts your subs' ability to provide you support.

So this hollow win theme actually counteracts the first two hollow win themes.

When building your solution, you want to have a great team, a great low-risk technical solution, and the

lowest possible price to undersell the competition. These are all clear goals of any proposal, but none of them are win themes and reliance on them shows a lack of a true winning strategy. Again, I can't tell you how to win your next proposal (and I don't want to), but I encourage you to ban these from any future win theme listings.

Matthew Kelley is a Proposal Manager who focuses on the needs and capabilities of small businesses to manage their proposal development efforts and submit compelling bids. His approach of streamlining efforts into key components for solution definition and compliance is ideally suited to the budget conscious company with limited B&P resources. Matthew is currently the Proposal Manager for Segue Technologies Inc., a custom software development company supporting the DoD (USAF, USN, USMC) and several commercial and non-profit customers such as Five Guys Burgers and Fries and the United Negro College Fund. Matthew Kelley can be reached at www.seguetech.com or at via email at Matthew.Kelley@seguetech.com.



MVP

MOST VALUABLE PROPOSAL

WE'VE GOT OURSELVES A GAME!

Let's win!



Developing A Winning Image For Your Proposal

by Bridget Skelly

With football back in full swing, the game provides an important reminder of what is really important –winning. This philosophy applies to those working on proposals the same as it does for the 32 organizations in the National Football League: winning is all that matters. We all find ourselves on a level playing field, confined to the same rules, playing against teams that have a similar capacity to get the job done. So, what separates the teams who consistently win from the ones who are steadily a step behind? *Mostly, it comes down to strategy, group chemistry, a little luck and the ability to utilize every small advantage that can be leveraged.*

The opening kickoff...

Face to face, it generally takes four minutes to solidify a first impression. Your proposal, however, is fundamentally disadvantaged. The person reading it has the opportunity to pass judgment before listening to how you recommend a solution. Whether conscious or not, there is an immediate “sizing up” of an organization and its capabilities based solely on the outer veneer. The old cliché is “never judge a book by its cover.” While great content can trump an ugly cover, an appealing appearance coupled with equally great content is a no-brain decision. Unlike a pitch being made in person, your proposal will be read in



the voice of the reader. Their perception of who you are as a contractor can be directly tied into the lengths taken to accommodate them through this selection process. The best way to accomplish this is to make their tedious job of reading walls of text as easy and (dare I say) entertaining as possible.

It should always be made clear exactly what you are offering within the first moments of reading, like making a dash for the end zone the instant your proposal is handed off. The aesthetics of your document sets the tone for positive perception and a likely discernment that you know what you’re talking about. Overly technical documents intimidate most readers and don’t instill much faith in your ability to communicate well. If you can’t explain your own proposal in a concise manner, then you probably can’t do what your proposal promises

either. Your writing choices reflect not only your effectiveness as a communicator, but also on your image as a whole. Understand that most people make decisions emotionally first, and logically second. If you can conceive an idea that appeals on an emotional level to your target, justify that visceral reaction with logical reasons. You’ve got their attention, now why should your bid win?

Stick to the game plan...

Know your audience. Do you think the Redskins square off against Dallas without knowing a little bit about their opponent’s team, tendencies and style? Now, of course, your client is not your rival, but circumstance is. These readers generally know very little about you other than your reputation and the bid you put before them. You can bet they’re going to play defense against that proposal

harder than the '85 Bears, remaining skeptical and weary until you prove otherwise. Don't waste time with superfluous content that screams of egotism. You should place yourself in the background and focus on the needs of the client, appealing to their needs and ego, not yours. By all means, be social. Discuss people, not merely statistics, which make you appear distant and removed from your business. Explain abstract concepts in human terms: use the names of people who have found your proposed methods satisfying, and discuss complex issues or technical jargon using social context. This makes it easier to understand on the reader's end, while showing that you know how to get your point across in a relatable manner.

Visuals are processed
60,000 times
faster than text.

The MVP

Obviously, the Most Valuable Proposal is usually the most cost effective one that offers a solution within RFP parameters. But, in those frequent circumstances where pricing is similar between a handful of bids, the smaller nuances of your proposal are like a clutch kicker in the fourth quarter. If you want to secure the victory, avoid generic templates. Nobody wants to feel like they're on the receiving end of what amounts to SPAM. Pinning your hopes on a second-string format



is like sitting your best player on the bench when it counts the most. Being visually memorable and unique cannot be undersold as an effective strategy, as it assures name recognition when it becomes award-time. The most tried and true way to achieve this is through informative, effective and meaningful images.

Unlike words, which are stored in the short-term memory, images immediately route into the long-term. This is why it's important to utilize visual aids in conjunction with strong writing, making your proposal memorable in the client's mind. Visual information processing is a skill fostered long before we have the ability to process written information. Processing text is a laborious mental act that the brain decodes in a tedious linear and sequential process. Visuals, however, are processed in their entirety all at once, making them 60,000 times faster than text at reaching the part of your brain that reacts to information.

Try it out: which do you think more effectively communicates a simple, everyday concept: an image of a football, or a written description of one? The better your client understands what you are conveying, the more interested

Football.

"An inflated oval ball used in the game of football"

Definition from the Merriam-Webster Dictionary

they become in your solution. This interest aids persuasion toward your main points, as well as piques their retention of it. We maintain that *the appearance of your presentation is only second to pricing in regards to importance*, making it a vital criterion for developing your own MVP. To quote the late, great hall-of-fame inductee, Al Davis, "Just win, baby."

References:

1. <http://www.copyblogger.com/psychological-selling/>
2. <http://www4.uwm.edu/cuts/bench/commun.htm>
3. http://mattstoner.net/presentations/effective_visuals.pdf
4. http://www.rgd-accessible-design.com/wp-content/uploads/2010/11/RGD_AccessAbility_Handbook.pdf

As an accomplished, award-winning creative expert, Bridget brings more than a dozen years of experience to her role as a Creative Director in the proposal industry. Utilizing intangible insight and strategic expertise, her contributions to proposals have resulted in billions of dollars in contract revenue for clients in the healthcare, IT, environmental, security and defense industries. Now with Bridged Design, Inc., she inspires a creative excellence that befalls the entire design team – crafting attractive and communicative proposals and presentations that inform, educate and entertain your target audience. In such a trepid industry, Bridget and her creative team strive to bridge the gap between your innovative solutions and the customers' mission. Bridget can be reached at Bridget@bridgeddesign.com.



Winning Solutions Begin With A Winning Proposal Team

by Lisa Pafe

Crafting a winning solution is an intellectual challenge, but it is also a team challenge. No proposal is won by an “I”; all are won by a team. Yet no matter how many masterminds you assemble, *the proposal team is often its own worst enemy.*

As a proposal or capture manager, how many times have you thought you did everything right? You develop the win strategy, win themes and discriminators; shred, outline and storyboard the RFP; pick solid teaming partners and issue data calls; and assemble a team of experts to architect, write and review...only to result in a color team draft that offers a non-compelling or even non-compliant solution. With a proposal draft that does not reflect the winning vision, what happened?

Let's step back from the proposal solution, and take a look at the team. Proposal teams are short-term, often hastily assembled, and face enormous time constraints. People cycle in and out (writers, solution architects, subject matter experts, reviewers). The team members typically offer diverse levels of understanding of the proposal process. Often, some members are remote, working another full-time job, and/or are at best reluctant participants. They may consider proposal work low priority and demonstrate a lack of commitment to the team. Team members might even show disrespect for the proposal or capture



manager who is not their line boss. And finally, proposal teams often include teaming partner companies with their own agendas.

All of these issues could be worked out if you had more time, say six months or so. **All teams go through five developmental stages** that psychologist and educator Bruce Tuckerman identified decades ago:

1. Forming
2. Storming
3. Norming
4. Performing
5. Adjourning

Organizational research tells us that three-fifths of team time is taken up by the first two stages. With a 30-day turnaround, that means your proposal team has only week and a half left to norm and perform.

The solution is to quickly advance through the first three stages to begin

performing. Through lessons learned, organizational and group theory, and the school of hard knocks, I've developed some strategies to evolve to the performing stage more efficiently and start working on the winning solution.

1. Forming. In the forming stage, clarity and communications are paramount. The assumption is that you are already following best practice at kick-off, and providing a detailed opportunity overview, contact list, outline, assignments, writing templates, schedule, etc. How can you make communications more efficient? First, ensure the team is clear on the goal. Yes, our team wants to win, but why? Offer a comprehensive vision of what solutioning for this win means in terms of strategy, positioning, growth, profitability and jobs. Yes, the proposal must be compliant and compelling, but how do we define those terms? Often team members don't ask questions because they don't

Spend time off-line with each team member to ensure understanding and answer questions privately while building rapport

want to appear uninformed. Why is each team member here? Team members may not know each other. Share with the group each contributor's experience, competencies, role and responsibilities.

Get off-line. During forming, avoid relying solely on team meetings. Spend time off-line with each team member to ensure understanding and answer questions privately while building rapport. Remember that during the forming stage, team members tend to be more polite and hesitant to voice opinions or ask questions. By conversing with each team member privately, you can encourage them to pose questions and raise any concerns. You can also better gauge their capabilities.

2. Storming. Storming is the most challenging stage, but it is necessary in order to proceed to the norming stage. Differing opinions can create conflicts that lead to anger, confusion, hurt feelings and/or frustration. Exercise authority. Keep team meetings to the point, within time constraints and follow the agenda, but do ask people to speak up and voice opinions. Respectfully acknowledge issues or conflicts raised and try to resolve them. Continue to remind everyone of

the end goal and the need to advocate for the win. Avoid getting defensive or taking it personally when team members express frustration or anger. If team members continue fighting and/or straying off topic, call them on it. Create a parking lot for their issues, and address them off-line, one-on-one. In other words, circumvent the team as needed.

Don't get stuck in storming. You don't have the luxury of time to work through storming at a leisurely pace. Therefore, apply an Agile, iterative approach to proposal development. Require contributors (individuals or small groups) to submit their assignments daily in small increments so you can provide feedback and coach them as needed. If you see a way another team member can help with the solution, get them involved. In other words, use storming as the pathway to continuously clarify and build a stronger team.

3. Norming. Norming is when the team members start to become comfortable with their individual roles as part of the group. You've helped them progress by confronting issues, clarifying questions and coaching poor or struggling performers. Continue to require frequent iterations of work products. Use praise and constructive, actionable criticism as needed. Quite often, some team members may refuse to norm. You may have to remove them from the team if they are disrupting progress.

Anticipate regression. Be aware that as team members cycle out (after completing a writing assignment) and cycle in (as reviewers), the team may regress back to storming. You need to apply the same method of working one-on-one with new team members, coaching and clarifying issues to develop the solution. You also need to gather feedback and lessons learned from the exiting members.



3. Performing. During the performing stage, the team becomes more self-directed. As new members cycle in or out, the team is less likely to regress back to storming. Continue to be fair, decisive, in control and demanding. Ensure the proposal products are on schedule, compliant and compelling, and redirect the team if they are moving off course.

Exploit strengths and weaknesses: As the team is now a cohesive unit, the proposal team members better understand each other's competencies. Ensure the team is exploiting these – in other words, if someone is better at reviewing the solution than writing, switch roles. If someone isn't adept at using Word templates, tell

them not to waste time making the proposal pretty. *Assign work based on competencies so everyone is performing at their peak.*

5. Adjourning. Once the proposal is submitted, remember to thank team members for their contributions. Part of your lessons learned process includes gathering feedback from each contributor as well as assessing each team member's performance to use in the future when building proposal

teams. This assessment also includes subcontractor teaming partners. Record lessons learned on how well the techniques described above work. These ideas sound easy, but are often difficult to practice and require repeated proposal efforts to perfect.

Don't forget the team after submission. Remember to inform all team members of the bid outcome. And of course, invite the entire capture and proposal team to the win party!

With 24 years' experience in business capture, process improvement, project and proposal management, and proposal operations, Lisa Pafe is an APM/APMP and a Project Management Institute (PMI) certified Project Management Professional (PMP) as well as a trained ISO 9001:2008 Internal Auditor. She serves on the APMP NCA Board of Directors as Chair of the Dinner Series Planning Committee. She holds a B.A. in Political Science from Yale University, a Masters in Public Policy from Harvard University, and a Masters in Information Systems from The George Washington University. Lisa can be reached at lpafe@lohfieldconsulting.com.

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Ten Ways To Write A Losing Proposal

by Shlomo D. Katz

In this issue, you will read many excellent articles about writing winning proposals. This article will summarize some common mistakes offerors make. If you want to increase your chances of writing a losing proposal, these are mistakes that you can imitate.

1. Don't read the RFP.

The RFP, including all of its attachments and cross-referenced documents, is where you'll find the information you need to write a proposal that might win. To increase your chance of losing, skip some parts of the RFP on the assumption that they are not important anyway.

2. Give the Government what you know it needs, not what the RFP asks for.

This tip and the next two are related. Bid protest decisions from the Government Accountability Office (GAO) make it clear that offers must be judged against the RFP, not against some unstated criteria or secret statement of work. For example, if the RFP says the Government wants a yellow widget, it cannot award a contract for a red widget without amending the RFP and giving everyone a chance to bid on that. So, if you know that the user really wants a red widget, not the yellow one called for by the RFP, offer the red one in order to increase your chances of losing. Even if you are awarded the contract, the GAO will likely take it away after a protest.

3. Don't follow the RFP instructions.

The RFP instructions help make the competition fair. If they say your proposal should be 20 pages long, make yours 21 pages long and put some important information on the last page, where the Government will be forced to ignore it.

4. Don't address the evaluation criteria in your proposal.

Agencies are required to disclose the major evaluation criteria and then follow them. This is

also about fairness. If you want to make the evaluators' jobs harder and increase your chances of losing, don't clearly describe why your product or service should receive the highest evaluation ratings. Bury relevant information in your proposal or just omit it.

5. Assume the Government's proposal evaluators know your capabilities.

Incumbents are especially good at this one. Why waste valuable proposal space providing the information that the RFP requires when the customer already knows you? That's only for winners, who understand that the award decision is required to be based on what you wrote in your proposal, not on what the evaluator knows independently. (See my article, How



Proposal Evaluation Is and Is Not Like Grading a College Essay, in the Winter 2010/2011 Executive Summary issue.)

6. Don't justify your cost proposal.

Propose a price that's too good to be true, and don't explain why it's actually realistic.

7. Don't prove that your technical proposal is realistic and achievable.

Propose a schedule that's too good to be true or make incredible promises about the speed or reliability of your product, and don't demonstrate that those claims are realistic and verifiable.

8. Fail to recognize and mitigate organizational conflicts of interest.

Ten Ways To Write A Losing Proposal

Contracting Officers are not allowed to exclude offerors just because they might have an OCI, but they are permitted—indeed, required—to find out how offerors and contractors will mitigate potential conflicts. If you don't want to win, don't take this seriously. For example, don't think about whether your company has an unfair competitive advantage because it has access to non-public information under another contract, and don't think about common mitigation strategies such as so-called firewalls. And, whatever you do, don't disclose the potential OCI and/or your mitigation plan in your proposal.

9. Assume that you will be able to submit a BAFO/ Final Proposal Revision.

Only people who want to win offer proposals the first time around that the Government could potentially accept. Losers take it for granted that they will have the chance to make changes and sharpen their pencils, something that may or may not happen in reality.

10. Submit your proposal late.

If all else fails, get your proposal in a few minutes after the deadline stated in the RFP. That way, the Government won't even consider it. One way to do this is by not meticulously following the instructions in the RFP for how you should deliver your proposal. For example, if the RFP says that your courier should take the proposal to the second floor mailroom, have

him leave it at the first floor reception desk instead. That will help you lose.

Of course, you might not want to write a losing proposal. Perhaps you'd rather win. In that case, you can increase your chances by doing the opposite of what I've suggested above.

Thank you to my colleagues Ken Weckstein and Tammy Hopkins for some of these tips.

Shlomo D. Katz is Counsel in the Washington, DC office of the international law firm of Brown Rudnick LLP, a Corporate Sponsor of APMP-NCA. Shlomo specializes in all aspects of Government contracting and is a regular presenter at chapter events. If you have any questions about the topic of this article or other proposal or contracting issues, please contact Shlomo at 202.536-1753 or skatz@brownrudnick.com



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September Dinner Series Event Focused On Proposal Processes That Fuel Growth

by Lisa Pafe

Which is more important? Mature processes or experienced proposal professionals? Representatives of three companies demonstrating explosive growth and success in today's volatile marketplace shared their insights at the September APMP-NCA Dinner Series event at the Tysons Westin.

The Proposal Processes that Work for Your Company's Size and Maturity panelists included **Eric Gregory**, Senior Vice President of Proposal Strategy and Operations for CACI, APMP Fellow, and former APMP Board Member, COO and CEO; **Hélène Courard**; Vice President, Corporate Capture Management for Salient Federal Solutions, Inc., a mid-tier Federal contractor with an aggressive growth strategy; and **Jeff Handy**; President of Fulcrum IT, a recently graduated small business that has been recognized multiple years on the Washington Business Journals 50 Fastest Growing Companies and the Inc. 500/5000 Annual Exclusive

List of America's Fastest-Growing Companies. Moderator and event co-Chair **Alex Brown**, Director of Services for OST Global Solutions, expertly facilitated a lively Q&A session. Event sponsors included Bloomberg Government, Enxdi, Paolo Caredelli, Rainmakerz, and Richter & Company.

Panelists agreed that companies need to begin with mature processes that continue to evolve in order to reflect growth strategies and market changes. They also emphasized the importance of employing skilled, certified proposal professionals to fuel success. Finally, companies benefit from leveraging technology that supports the trifecta of people, processes and tools.

Eric underscored the importance of starting out mature and staying mature. Commitment and leading by example enforce the processes, but companies must remain flexible to adapt to market changes. Hélène pointed out that processes minimize confusion, allowing proposal

teams to focus on the solution. She emphasized the "2-Win" – processes for today and for going forward. Both Eric and Hélène also discussed integrating acquisition companies by adding their best people and processes,



thus making them feel important as team contributors. Jeff Handy emphasized that processes add to the capacity of smaller competitors. For small companies, mature processes also serve to impress larger teaming partners and inspire them to forge mutually beneficial relationships.

The Dinner Series Planning Committee would like to thank our speakers, moderator and sponsors who made this event a success. We look forward to seeing you at the November 14, 2012 event on *Leveraging Graphics to Sell Your Solution*. Learn more or register at <http://www.apmpnca.org/events/events>



From left to right: Moderator Alex Brown, and speakers Jeff Handy, Hélène Courard, and Eric Gregory

With 24 years' experience in business capture, process improvement, project and proposal management, and proposal operations, Lisa Pafe is an APM/APMP and a Project Management Institute (PMI) certified Project Management Professional (PMP) as well as a trained ISO 9001:2008 Internal Auditor. She serves on the APMP NCA Board of Directors as Chair of the Dinner Series Planning Committee. She holds a B.A. in Political Science from Yale University, a Masters in Public Policy from Harvard University, and a Masters in Information Systems from The George Washington University. Lisa can be reached at lpafe@lohfieldconsulting.com

APMP-NCA And APMP International Upcoming Events

Connect with people and build your professional knowledge and skills

APMP Membership Enrichment Series—November 14, 2012
Educational Webinar, 2:00pm-3:00pm

Customizing Your APMP Accreditation Path

Whether you're from a large organization or a small consulting firm, you can take your proposal, bid, business development and capture professional expertise to a higher level. Let APMP show you how to develop a customized APMP Accreditation path that will deliver results for your career progress. Join us for a free member-only APMP webinar from 2:00pm-3:00pm on Wednesday, November 14, 2012. Ask the pros, "What do I do next?" We'll give you an overview of the APMP Accreditation program and how we can help you with your professional development plans.

Register at http://www.apmp.org/events/event_details.asp?id=253053

APMP-NCA Dinner Series—November 14, 2012
Education and Networking Event, 5:30pm-8:30pm

Leveraging Graphics to Sell Your Solution

Winning proposals require professional graphics that sell your solution. Three leading industry expert design professionals will discuss how the proposal managers and capture managers can best work in partnership with the graphics designer to conceptualize, render and produce professional graphics.

The marketplace is only getting more competitive, Bid and proposal budgets are tight, and proposal professionals are looking for ways to get their message across efficiently and effectively in order to stand out from their competitors. On the 14th we will show you how appealing, professional graphics not only sell the solution but make an important and lasting impression on customers.

Specific topics include:

- How to craft the Executive Summary graphic
- How to develop quick turnaround graphics
- Why the proposal cover is important to the win

Register at <http://www.apmpnca.org/events/events/apmp-nca-dinner-series-2012-november-14th-event/>

Hurry and Register Now before seats are filled!

Mark your calendars with these
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APMP Int. Membership
Enrichment Series Webinar:
*Customizing Your
APMP Accreditation*

November 14, 2012
5:30pm-8:00pm

APMP-NCA Dinner Series in
Falls Church, VA: *Leveraging
Graphics to Sell Your Solution*

December 19, 2012
2:00pm-3:00pm

APMP Int. Membership
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*Getting the Most Out of Your
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May 28-31, 2013

APMP Int.'s Annual Bid and
Proposal Conference, this year
in Atlanta, GA

To learn more, please go to:

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APMP-NCA Board of Directors Meetings are Open to Members

The Board of Directors for APMP-NCA meets the first Tuesday of every month. Every other meeting is a virtual meeting via a telephone conference. If you would like to join a meeting, contact us by going to <http://www.apmpnca.org/contact/>.

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