



# EXECUTIVE summary

Winter 2012 | Volume 18, Issue 1

## This Issue's Theme: **Planning Your Pipeline**

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# Developing Your 2012 Pipeline and Preparing for Another Great Year of Winning Business

by Olessia Smotrova-Taylor



If you are anything like me, you've dealt with three challenges during the holidays – trying to keep from overindulging too much and gaining hard-to-shed pounds; fighting off a recurring cold; and trying to juggle family time with proposals that are due early to mid-January. By the way, I am officially envious if you faced no challenges or dealt with them through advance planning and orderly life. You are my hero.

This article is for everyone else who is not a planning maven, or like me, tends to pile the plate so high that no amount of planning is enough, no matter how hard I try. Now that the holiday hustle and bustle is over,

and there is relatively smooth sailing through the frigid months ahead, it is time to slow down for a day or two and finally plan. Dust off your crystal ball, sharpen your pencils, and let's talk about getting your company (and you) to that next level of growth.

## **My first question to you is: what does your opportunities pipeline look like for 2012?**

This question is relevant to everyone – not only the executives, but also capture and proposal staff, and even proposal consultants. Every business has to have a healthy pipeline to thrive. It is surprising, however, how many simply do not have one, have proposal staff that don't know about its existence (if there is one), or have

one but are skeptical about its quality and usefulness. I hear a common story that bespeaks of broken pipelines from small and large companies alike:

- “We only submitted a handful of proposals last year; we could be proud that we are picky but our win rate is so low”
- “We cannot find opportunities that match our exact area of expertise, so our pipeline is small and won't sustain our desired growth”
- “We bid on everything – I think our bid-no-bid process is broken – and having everything under the sun in the pipeline simply doesn't make sense”

A quality pipeline directly correlates to your future revenue. Or lack thereof.

- “We keep going after bluebirds – we haven’t updated our pipeline in a while”

Or better yet,

- “We don’t know what our Bid and Proposal budget is. Because no one has planned the pipeline for the year. Therefore, we have not decided how much investment is needed to win the opportunities that show up in the pipeline to reach our annual goal, while factoring in our win rate.”

If you recognize your company in the statements above, or have other pipeline challenges, it is time for change. You have to put business development higher on your priorities list, because a quality pipeline directly correlates to your future revenue. Or lack thereof.

If you are a business owner, executive, or a consultant, make sure that you make this an investment year into your pipeline development. It will contribute to your peace of mind, and give you greater control over your destiny.

If you are working in a proposal department – wouldn’t it be nice to bring some degree of planning and order into your resources, time, and efforts? Perhaps, you would be compelled to act bolder and ask your management for more resources knowing that you are facing a churn-and-burn proposal stretch. Maybe you could dedicate more time to capture – even if you could do a little bit at a time while you are busy on other pursuits. All of it will lower your stress and contribute to your quality of life.

### **My second question is, have you looked at your industry’s trends?**

What does the immediate future hold for you and your company? For example, with the government moving

more and more work to the Indefinite Delivery Indefinite Quantity (IDIQ) vehicles and GSA and VA schedules, have you caught up and learned how to turn your company into a task order winning machine? What was the last time you have looked at the legislative changes impacting government contractors? What areas will continue to grow, like Cyber and Security fields – and what industries are bound to shrink with the budget crunch? How are your target customers changing their procurement behaviors given the state of the economy? How will you adjust the type of opportunities you are bidding on?

Also, what are your competitors now doing to beat you? Are they cutting costs? And if so, how are they doing it? Are they investing into new initiatives?

Answers to these questions will shape your pipeline even further.

These questions may seem irrelevant to proposal managers, coordinators,

## Fun Fact...

**Planning Big:** The Eisenhower interstate system requires that one mile in every five must be straight. These straight sections are usable as airstrips in times of war or other emergencies.

**Planning Thrifty:** American Airlines saved \$40,000 in 1987 by eliminating one olive from each salad served in first-class.

**Inventions:** In 1945, Raytheon engineer and inventor Percy Spencer stood in front of a magnetron—a radar component—and noticed a chocolate bar start to melt in his pocket. Curious about the magnetron’s potential, Spencer obtained a bag of popcorn kernels and watched them pop next to the magnetron. The microwave oven was born. Radarange, the world’s first microwave oven, was 6 feet tall, weighed 750 pounds, and cost around \$5,000. It wasn’t until 1967 that a popular countertop model costing \$495 hit the market. Today, most Americans own much cheaper and more efficient models.

writers, editors, and other proposal professionals not as directly involved in strategy and planning – but I beg to differ. It will make you a better rounded professional if you understand what the industry is doing and how your company is likely to react – and you can adjust accordingly if there are certain risks on the horizon.

### **Which brings me to my third question– have you looked at your career and growth opportunities for 2012?**

What will you do to advance yourself, earn more money, and get greater job security, while helping your business? Will you stay in the same field or will you expand your abilities? In the business development field, there are always ways to command higher pay, be more in demand, and ultimately become more successful. On the other hand, many proposal professionals narrowly specialized in one field may find themselves in less secure positions.

To change this situation, it is important that you don't succumb to burnout-induced complacency. Explore professions that are adjacent to your fields to increase your competitiveness and pay grade. There are natural career paths for certain professions. For example, proposal

managers would greatly benefit from getting training in management, capture management, orals coaching if your customer set uses orals, technical writing, pricing, desktop publishing, and graphics skills – and could definitely use training in cost proposals development. Capture managers should expand their skills into proposal management, business development, price-to-win, and cost strategy. Technical writers should consider proposal coordination and proposal management as a career path if they are comfortable with higher levels of responsibility over the team. Proposal coordinators could venture into desktop publishing, graphics, and editing; or step up and become proposal managers.

For executives, investing into developing more versatile proposal teams means higher success rate in winning proposals, and the ability to rotate personnel from one role to another on a variety of proposals, preventing team burnout. And, ultimately, getting a more skilled resource pool may mean a different type of pipeline where you can be more aggressive in pursuing opportunities.

Determine what training courses you are going to attend in 2012 to expand your capabilities, and definitely plan

to make it to the APMP-NCA's educational events.

Well, onward and upward, as some of my dear friends like to say. If you haven't already asked yourself or your colleagues these three questions, it may be time that you do. Life may not go according to a plan, but it is better to have one anyway. Life without a plan is almost guaranteed to have much less spectacular results. I wish you a professionally and personally rewarding year!

Olessia Smotrova-Taylor is the President and CEO of OST Global Solutions, Inc. She is a currently practicing capture and proposal manager who has won more than \$17 Billion in new business. As one of the proposal industry leaders, she served on the Board of Directors of the Association of Proposal Management Professionals' (APMP) National Capital Area (NCA) chapter as the editor and chair of the APMP NCA Executive Summary e-zine for 4 years since 2008, and as a president for 2012. She regularly presents at the APMP's international and other conferences, roundtables, and proposal boot camps, and runs popular training webinars on business development. She has 16 years of experience in proposal and capture management, marketing, and communications. She is a prolific author, speaker, trainer, and blogger, and is well-known in the global proposal community. Her self-study course, Executive Summary Secrets, sells worldwide. Olessia can be reached at [otaylor@ostglobalsolutions.com](mailto:otaylor@ostglobalsolutions.com) or at 301-384-3350

### **Note From the Editor, Julia Pohekueva**

Please take a few minutes and let us 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. We can be reached at [jpohekueva@ostglobalsolutions.com](mailto:jpohekueva@ostglobalsolutions.com) or 301-384-3350.





# Should I use captions with my proposal graphics? If so, what best practices do you recommend?

by Mike Parkinson

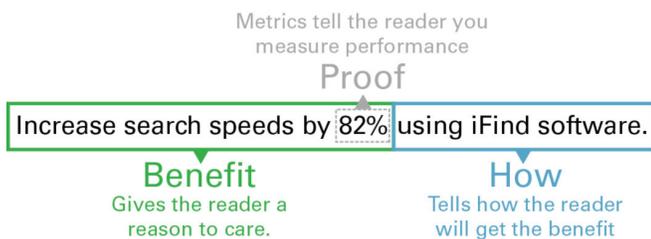
Yes, I highly recommend using captions with your graphics.

I am referring to the title of your graphic—also called a caption. This article does not address numbering graphics or referencing specific RFP requirements. (Of course, you want to make it easy for the evaluator to find and link your graphic to a RFP requirement, so why wouldn't you do this?)

Good captions accomplish two things:

1. Quickly and clearly share your graphic's primary message.
2. Give the reader a reason to care about your graphic.

If your goal is to influence or persuade your audience, your caption should be one sentence long and include a benefit and a “how” (often the solution). Place the benefit before the how to give the reader a reason to care about your solution. Whenever possible, include quantitative data to further validate your assertions. Professionals in almost every industry have a visceral, gut reaction to quantitative data, because what is measured is improved. Measuring or quantification tells the reader that your solution is tested, process-driven, repeatable, and lowers risk. The following is an example of a good caption.



If your goal is to clarify or explain, and persuasion is not needed, your caption should summarize the content of your graphic. For example, “Company X’s organization.” Knowing that a proposal is intended to influence, motivate, and persuade, I always include a benefit: “To ensure an

easy transition, Company X’s organization includes key personnel with 20 years of iFind software experience.”

To be successful, your graphic must be consistent with your caption. To confirm that your graphic is synonymous with your caption, remove the caption and ask others what conclusion they reach after reviewing the visual. If it is similar to your written caption, you have a successful caption. If not, modify your graphic or rewrite your caption based on your goal.

Sadly, most graphics do not communicate what the caption states. The solution: write your caption first and then create the graphic based on the idea stated in your caption.

I use slightly different approaches for written and oral proposals.



## Written Proposals

1. **Placement:** Captions are shown beneath your graphic. It is the accepted convention and therefore expected. Your goal is to make it easy for the reader/evaluator to find what they are looking for.

## Should I use captions with my proposal graphics?

2. *Style:* The style should be different than the body text, so the reader knows it is associated with the graphic and not surrounding body text. (You can certainly get away with a different color or size along as it follows your template and RFP requirements.)
3. *Government vs. Commercial:* The approach I recommend for Government proposals is not the approach I recommend for commercial props. Government proposals tend to require condensed line spacing (leading—the space between lines of text) whereas commercial proposals include more white space with a wider selection of aesthetic and organizational options.

the “take away.” I place my captions in stylized boxes no smaller than 14-point type (usually 20 point).

3. *Government vs. Commercial:* For commercial proposals that do not have strict RFP stipulated outlines, I use an edited, shorter version of the caption as the title. I do so because the purpose of a good slide title is to make the audience care about the content of the slide. For Government proposals, place the caption at the bottom of the slide (see #1).

Follow these rules and match your caption to your graphic to ensure clear, concise, compelling communication and watch your success rate rise.

## Oral Proposals

1. *Placement:* The caption should consistently appear at the bottom of your slides. Think of it as your “take away.” It is the final word or conclusion of the slide.
2. *Style:* The caption is large enough and distinct enough to be readable and consistently recognized as

Mike Parkinson is an internationally recognized visual communications expert and APMP Fellow. He is a partner at 24 Hour Company ([www.24hrco.com](http://www.24hrco.com)) specializing in bid-winning proposal graphics. His Billion Dollar Graphics web site ([www.BillionDollarGraphics.com](http://www.BillionDollarGraphics.com)), BizGraphics On Demand web site ([www.BizGraphicsOnDemand.com](http://www.BizGraphicsOnDemand.com)), and Billion Dollar Business Graphics book share best practices and helpful tools with proposal professionals. Contact Mike at [mike@24hrco.com](mailto:mike@24hrco.com) or call 703-533-7209.



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Interview with Business Development Expert

# Successful Planning for Your Business Development Strategy

by Julia Pohekueva



**A**s some psychological studies assert, if an idea and its implementation is written down, there is about 50% probability of it to become reality. If the implementation is organized into steps and written down, it will have somewhat 70% probability of being done. Adding date to each step will give this idea up to 95% chance of being done. That said, planning ahead clears the path for even the most unpredictable, and seemingly impossible to excuse projects. This applies just as much to the mystery of business development process in government acquisition.

In today's economic environment, when changes are abundant, some

might give up on planning efforts for business development process further than just a few months ahead. As much as we try to follow all the recent news and trends, the level of unpredictability limits planning horizons. Most experts however, agree that planning is still quintessential part of a business' success.

Alex Brown, business development expert with 20 years of experience, reveals some of his secrets of pipeline planning for government contractors in his interview with Julia Pohekueva, the Executive Summary E-zine Chair, and Editor.



## Role of Planning

**Julia:** What place does planning hold in your business development strategy?

**Alex:** The definition of planning is both the organizational process of creating and maintaining a plan, and the psychological process of thinking about the activities required to create a desired goal on some scale. The basic definition of Business Development (BD) is evaluating a business (or business line) and then realizing its full potential through strategic analysis, account planning, intelligence gathering, and positioning. Simply put, you cannot perform business development properly without planning. It is part of every step, or should be. The key to BD planning

is what I call flexible process. You have to develop a pipeline, but you have to be able to move with the constant changes in federal government contracting.

**Planning Process**

**Julia:** What are the main steps of the pipeline planning process?

**Alex:** The steps consist of answering four questions and one exclamation: “who?”, “what?”, “where?”, “when?” and “wow!” Who are you as a business— what are your capabilities, key skills, and goals? What are these capabilities? Where have you performed the skills in your capabilities? When did you perform the tasks in your capabilities? Do your capabilities and past performance match your current goals and direction? WOW! This is the basis of your planning. There is a quote that I think about when I think about planning: “If you want to know your past, look into your present conditions. If you want to know your future, look into your present actions.”

**Julia:** When do I have to start planning for the next year?

**Alex:** On the day you start, and you never stop. Timelines are often used but the process should be thought of more as a circle than a line.

**Julia:** What kind of sources should I use when planning my pipeline?

**Alex:** There are many commercial sources (GovWin, Centurion, Bloomberg, FedBizOpps, e-pipeline, CCR, FPDS) that can be used with your current contacts (i.e., your operations support on contracts) and your

Remember, you have to have everyone on the same page to be able to move forward quickly and efficiently.

key managers. Remember, you have to have everyone on the same page to be able to move forward quickly and efficiently. Once your pipeline is developed, it needs to be reviewed and updated consistently to stay current; the industry landscape changes on a weekly basis.

**Julia:** How often throughout the year should I review my pipeline and what affects changes to my BD strategy?

**Alex:** You should set milestones at two levels. The first level should be completed weekly at a minimum, preferably daily, on changes that are happening in the agencies and contracts you are following. The second level should be completed quarterly. You have to be prepared to point the company in the right direction; if the current line is closing, you must be ready to move to open waters. Olessia Smotrova-Taylor, owner and president of OST Global Solutions, reminded me that risk and mergers/acquisitions need to be taken into consideration at all times. Remember, risk assessment is based on your company’s position now and will drive decision. And what is off-limits or out of reach today pertaining to mergers and acquisitions, may become necessary

when needing to add skills and or past performance.

**Current Environment**

**Julia:** What are your predictions for the industry for the next year?

**Alex:** The contracting world has become a game of musical chairs—the chairs are disappearing and everyone has to fight for the remaining seats when the music stops. Many stand-alone contracts are moving to already awarded or being condensed to upcoming MAC vehicles. Cost is king and will remain so with the budget reductions and the simple fact that everyone is watching their bottom line. This environment will cause many companies that have stayed in their “core competencies” to venture out to new lines of business. I call this environment the 6 degrees of separation. There will come a time where everyone will be connected because of all the teaming arrangements that companies will be on.

**Julia:** How is industry climate different now from when you started and what is still true now?

**Alex:** I do not see that the climate is different. Every few years someone proclaims “It is more competitive now than it ever has been,” at the time this statement is true. But, it is ALWAYS becoming more competitive. What I see today is more agile companies, navigating faster and winning more. The thing to keep an eye on is not climate but trends. Who are agencies spending with, and what are they spending on. FFP is the future (for

## Successful Planning for Your Business Development Strategy

now), gone are the days of CPAFs, but trends will tell you we will go back when the need is there. Companies are more willing to take a risk and each and every day we read a T&C that we would NEVER have said yes to and find ourselves accepting them. This leads back to the term I used earlier—"flexible process." The government wants agility, and they want to work with companies that can be just that, agile.

**Julia:** So, what is more important in BD: relationships or knowledge and skills? What is the balance between them, and how to find/reach it?

**Alex:** This is the age-old "chicken or egg" question. The answer is neither. To properly perform BD at its best,

you must have both. Balance is key, Cirque du Soleil proves this point every time they take to the high wire. With balance, you can perform miracles.

Alex Brown has been in business development for over 20 years. At OST Global Solutions, Alex was brought on to develop multiple service lines including direct BD services for clients, multiple classroom training programs (from capture to writing) and a re-launch of their consulting division. Prior to his work at OST Global Solutions, Alex supported Proposal Development Consultants as a relationship manager for consultants and federal contractors in the metro DC area. Also, at VediorNA and Ingenta, he worked both in business development and in information architecture/project management, to servicing Fortune 500 clients in the Boston metro area. Currently he is on the board of director for APMP-NCA, and is an avid laser tag player. Alex can be reached at [abrown@ostglobalsolutions.com](mailto:abrown@ostglobalsolutions.com) or at 301-384-3350.

Julia Pohekueva is APMP NCA e-zine editor and has eight years of experience in marketing, finance, and business administration in international corporations, small business, and non-profit organizations. As the marketing manager at OST Global Solutions, she has helped launch the Training and Business Development Services divisions while reinvigorating already profitable consulting division through development of new intelligent marketing plans that she and her team have implemented with success. She has Master's degree in marketing and bachelor's degree with honours in Business Management.

# Federal Business Development

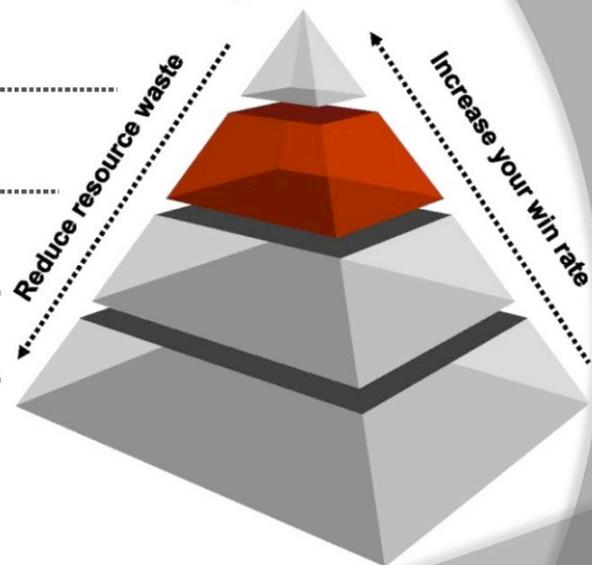
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# Strategic Staffing for Your BD Pipeline

by Rosalind Angus, APMP-NCA Networking Chair



**M**any elements go into planning the business development pipeline. The fundamentals lie in strategic planning, and establishing a blueprint of target markets and customers. Then there is the assessment of capabilities relating to infrastructure, tools and processes. In addition, there are important considerations when it comes to PEOPLE. Who in your organization will go after your target revenue pursuits? How well equipped is the organization in terms of qualifying opportunities and helping close the deal with the submission of a compliant and compelling proposal? Whether the responsibility lies with dedicated

business acquisition and proposal development professionals or with senior operational executives and program staff, the key is to ensure you have the right team on board.

Hiring the people who will help achieve your pipeline goals is crucial. A key question companies may face is in deciding whether to bring on new employees to join the team as full time hires, and/or engage the services of independent consultants or consulting firms.

## **Outsource**

Many organizations routinely use staff augmentation or consulting services as a formal part of their business plan. Most companies allocate a part

Request For Proposal schedules can be notoriously unpredictable, so it makes sense to purchase interim help rather than full time hires

of their Bids & Proposals (B&P) budget upfront. Typically, they will spend most of those funds on proposal development resources to augment the efforts of their internal, core proposal team during surge periods. The cost benefits of using 'on demand' support services are obvious; Request For Proposal schedules can be notoriously unpredictable, so it makes sense to

Firms are increasingly willing to invest their B&P dollars on business development and capture consultants where, for example, they are looking to break into a new segment or customer.

purchase interim help rather than full time hires who may be under-utilized throughout the year, (and not least, to save the health and sanity of your internal team when the pace picks up!)

One of the biggest challenges companies can encounter is expanding their portfolio of products and services to new customers. Firms are increasingly willing to invest their B&P dollars on business development and capture consultants where, for example, they are looking to break into a new segment or customer. While the total costs over time can make a large dent in the budget, this scenario can make a lot of sense when companies want to jump-start the process versus building their internal capabilities completely from scratch.

### Hire New Team Members

Faced with a lack of intimacy with target customers, organizations may sometimes decide to buy the relation-

ship. This may happen via the outright purchase of another firm that already has choice contracts with the target customer, or more often, by hiring individuals who ostensibly come with the contacts and relationships with key stakeholders within the desired customer organization. The latter option, however, presents somewhat of a recruiting conundrum, e.g., while former ‘top brass’ recruits from agencies may be considered quite a catch, these individuals may not necessarily have the business development acumen or experience to be truly effective in their new role. Not least, relationships, where they exist, may be short-lived due to the merry-go-round career life-cycles within the government space, particularly within the contracting office communities. It may be relatively easy to find individuals with current, meaningful relationships or who have a strong track record in securing new contracts; however, finding the rare individual who has both sides of the coin can be a real challenge.

### How Do You Find “The One”?

Most of the points below will apply whether you are thinking of bringing on full time hires or engaging consultants.

**First**, before rehashing an old job description, consider carefully about the mission and goals of your organization or department. What role does the individual need to fulfill to meet the needs of your business strategy? How will the person contribute? If hiring a consultant, it is still a good idea to

go through this process and formalize what you are looking for, before going to market.

**Second**, be realistic – draw up your ideal list of target qualifications, background and experience, but be realistic enough to realize that the candidate with a 100% perfect fit may not exist. Many firms waste valuable time waiting to find the elusive perfect fit, and miss out on opportunities to hire a great individual who will help achieve their mission or departmental goals.

**Third**, establish parameters for measuring success. Set realistic goals and objectives and milestones. And communicate them upfront during interview and offer stage. This is particularly important for business development hires. Consideration should be given to the level of current relationship with the target customer base, the realistic length of the sales cycle, and the sophistication of internal business acquisition processes and tools.

What role does the individual need to fulfill to meet the needs of your business strategy? How will the person contribute?

**Finally**, do your due diligence. While this sounds obvious, only a certain

number business development individuals track their own contract pursuit history. A savvy professional should keep a running list of their own 'past performance' in terms of pursuits, the functional role(s) they played and the outcomes – whether won or not. They should be able to articulate on the work they did specific to agencies, industry verticals

and types of contracts. And whether for consultants or full time hires, always conduct references!

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

### Quick Quote...

Government proposes, bureaucracy disposes. And the bureaucracy must dispose of government proposals by dumping them on us.

P. J. O'Rourke

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# Reflections on APMP Membership and Value From an Outgoing NCA Board Member

by Chris Simmons



I originally joined APMP in 2006 out of curiosity. It was my first association and I wanted to signal to customers and prospects that I was a ‘member’ of the de facto BD/proposal professional association in our industry. This seemed like an important credential at a critical time when my small business was expanding in the marketplace.

## Excuses, Excuses

Despite paying the annual dues out of my own pocket, I always seemed to find excuses not to attend meetings. I was an APMP member and affiliated with the NCA Chapter—but in name only. It wasn’t until I started participating in regular events (annual conferences, bi-monthly Roundtable/Speaker Series, and Proposal Basics Boot Camp) that I discovered the real value of APMP and our local chapter.

## Get involved

I eventually met a number of board members at local chapter events and approached them with a few ideas and suggestions. Before I knew it I was invited to attending local chapter

board meetings as a guest. Shortly thereafter, I was asked to fill a critical need in helping to grow the membership of the chapter. The following year, I was elected to the NCA board as the Membership Committee Chairman. Once I started contributing to the chapter as a board member, it seemed like new opportunities for personal and business growth were everywhere. Because of my APMP involvement, I have grown both personally and professionally to levels that I never imagined possible.

The more you put into it, the more you get out of it. The more time and effort I put into the local chapter, the more I seemed to get out of it. I have been asked to write feature articles for the 24 Hour Company eZine and present at International and local conferences, roundtables and speaker series. I became a regular contributor to the NCA eZine and was invited to contribute to the APMP Journal and Perspective publications.

## Benefits?

It’s a challenging exercise to quantify the benefits that APMP has provided in the five years since joining. I have invested countless hours in the organization at multiple levels and it’s hard to know where my company (and I) would be today if I hadn’t gotten involved. One thing is certain: APMP speaking engagements

routinely generate a significant number of opportunities for new business, partnerships, and consulting relationships. Over the past five years, my company has grown to the point where repeat business from 100+ customers and word-of-mouth generates all the business I want or need. More importantly, I have made personal and professional relationships that will last a lifetime.

Because of my APMP involvement, I have grown both personally and professionally to levels that I never imagined possible.

## Let’s Exchange Ideas

Do you have an opinion on the value of APMP and affiliation with NCA? Do you have ideas for making APMP more valuable to you or your company? Would you like to get more involved but don’t know how? If so, let’s continue the dialogue on a LinkedIn discussion group, the new NCA website blog, or one-on-one.

Chris Simmons is the vice president of the APMP National Capital Area (NCA) chapter and regular contributor to both the APMP Journal and NCA eZine. He is also the founder and principal member of Rainmakerz Consulting—a business development solutions company specializing in all aspects of proposal development. Contact Chris at [chris@rainmakerz.biz](mailto:chris@rainmakerz.biz), 202-255-2355, or visit [www.rainmakerz.biz](http://www.rainmakerz.biz).

# Honoring our Departing Board Members

by Olessia Smotrova-Taylor



Everyone on the APMP-NCA Board would like to thank two of our outstanding long-time board members stepping down in 2012 after years of service. Here is some information about them – and their accomplishments:



## Brenda Crist, NCA Chapter President in 2009-2011

Brenda Crist is a 9-year APMP member who just finished her 2-year term as the President of the largest APMP-NCA chapter. She is a recognized industry leader for both her APMP and consulting contributions.

During her 5 years on the NCA Board, she has pioneered many strategic APMP initiatives such as accreditation training and independent research grants to raise the level of professional recognition in our field; spearheaded the NCA website upgrade; and initiated mentoring smaller APMP chapters such as the South Africa chapter.

She is APMP-certified at the professional level. She spearheaded efforts resulting in Foundation-level accredi-

tation for 111 NCA members. She mentored four APMP practitioner and professional accreditation candidates, and she is currently an authorized Foundations trainer.

Her leadership and work in close cooperation with APMP, resulted in redesign of our chapter website, which now offers better user experience and broader resources such as the Body of Knowledge, easier event registration, blog, and peer connections through social media.

She has been a regular speaker at APMP International and NCA chapter events and a monthly contributor to the Executive Summary eZine.

Brenda is a 20-year proposal veteran currently serving as Principal Consultant for the Lohfeld Consulting Group, with prior experience at Harris Corporation, and OAO (now Lockheed Martin).



## Chris Simmons, NCA Vice-President in 2009-2011

Chris Simmons has served on the APMP-NCA board for 5 years. He provided vision and leadership on a number of strategic and tactical initiatives including a key role in the website redesign task force, management of two NCA board elections, development of an enhanced corporate partner program, publicity campaigns for numerous programs and APMP, NCA grant selection task force, creation of new committees and special interest groups, and a variety of other important initiatives. He has also actively participated in Boot Camp and Membership Committees, and has worked closely with APMP to enhance membership reporting.

Many know him because of his role as a significant contributor to NCA LinkedIn discussions and a group manager, promoting APMP and helping fellow proposal professionals. He has also been a passionate speaker at numerous APMP venues on a variety of subjects, with the highest-attended events. He has been consistently rated in the top 5th percentile of speakers. A prolific writer, he has contributed more than 25 articles to the NCA Executive Summary eZine.

Chris has 25 years of experience in the proposal industry. He is the Principal at Rainmakerz Consulting LLC. Prior to founding Rainmakerz, he worked at CGI (formerly American Management Systems) and Deloitte Consulting.



## Brianna Coleman, 2009-2011

Brianna currently serves as a Senior Consultant for Lohfeld Consulting Group, providing proposal management and desktop publishing services to Federal contractors. She is highly skilled in technical writing, copy editing, desktop publishing, proposal strategy development, and project management.

Previously Brianna served as Global Proposal Manager for ESI International, a \$120M/year professional training company. For ESI, she completed 150 proposals per year in the Federal/state/local and commercial spaces.

She also served as Proposal Coordinator for a small MBE engineering firm and a mid-sized meeting planning organization.

An active member of APMP, Brianna often chairs Speaker Series events. She is a frequent speaker for APMP events at international and local levels. She is practitioner-level accredited through APMP.

Brianna has a B.A. in Psychology and Criminology/Criminal Justice from the University of Maryland (Cum Laude), as well as a Master's Certificate in Project Management from the George Washington University.



### **Michael Scruggs, 2009-2011**

Michael has MS., PPM-APMP, ITIL accreditation and more than 20 years' capture and proposal experience in the public sector marketplace. He currently supports both large and small IT government contractors through his company, Blue Score, LLC. He formerly worked for Microsoft, SAIC, and other IT firms in the greater Washington, DC area.

For the past 12 years, Michael has actively participated in APMP. He joined the NCA chapter in 2003, first serving as the corporate sponsors' program. He later served two terms as the President. In 2007, APMP leadership awarded Mr. Scruggs the Steven Shipley Award for Best Chapter Leadership.

He earned his master's and bachelor's degrees from Virginia Commonwealth University in Richmond.



### **H el ene Courard, 2009-2011**

H el ene brings over 11 years' experience in capture and proposal process & infrastructure and operations focusing on raising win probability and reducing effort required to create winning proposals. She is currently the Vice President of Corporate Capture Management for Salient Federal Solutions. Prior to joining Salient Federal Solutions, H el ene was Managing Director of Proposal Process and Infrastructure Solutions with Lohfeld Consulting Group, and spent over 8 years within CSC's Defense Group in various roles,

including establishing and running two Proposal Operations teams within the organization. H el ene is an active member of the Association of Proposal Management Professionals (APMP), National Capital Area (NCA) Chapter Speaker Series Committee (2008-2010) and has attained her Foundational Accreditation with APMP. She currently is serving her second term on the NCA Board of Directors as Speaker Series Chair, having also served as Chair for the Roundtable Planning Committee during the 2010 year. H el ene has a bachelor's degree from Saint Joseph's University and a law degree from Santa Clara University School of Law.



### **David Shaw, 2009-2011**

David is a knowledge management professional with 15 years of IT development and management experience, including substantial work in the legal, healthcare and marketing industries. He has a background in full life cycle project management and engagement management of collaborative systems. Currently he is a Managing Director at Portal Solutions, where his responsibilities include architecting and

delivering capture and proposal management solutions on Microsoft SharePoint. Prior to joining Portal Solutions, David was Director of IT at OCM, where he acquired extensive experience translating business objectives into functional information systems.

David holds a Bachelor's degree in Political Science and Information Systems from American University.

Olessia Smotrova-Taylor is the President and CEO of OST Global Solutions, Inc. She is a currently practicing capture and proposal manager who has won more than \$17 Billion in new business. As one of the proposal industry leaders, she served on the Board of Directors of the Association of Proposal Management Professionals' (APMP) National Capital Area (NCA) chapter as the editor and chair of the APMP NCA Executive Summary e-zine for 4 years since 2008, and as a president for 2012. She regularly presents at the APMP's international and other conferences, roundtables, and proposal boot camps, and runs popular training webinars on business development. She has 16 years of experience in proposal and capture management, marketing, and communications. She is a prolific author, speaker, trainer, and blogger, and is well-known in the global proposal community. Her self-study course, Executive Summary Secrets, sells worldwide. Prior to starting her own consulting company, she won business for Raytheon and Lockheed Martin, and wrote for the Financial Times of London. Olessia can be reached at [otaylor@ostglobalsolutions.com](mailto:otaylor@ostglobalsolutions.com) or at 301-384-3350

# Planning your Pipeline: Some Legal Considerations

by Shlomo D. Katz, Counsel, Brown Rudnick LLP

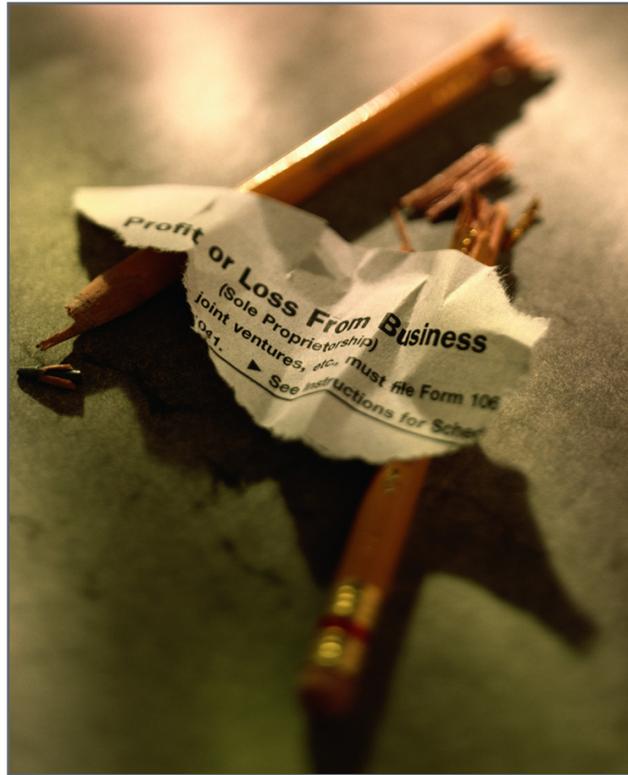


**H**ere are three quasi-legal questions you should ask when looking ahead to future bids:

- First, do I have the right to bid on that procurement?
- Second, do I have the right to stop my competitor from bidding?
- Third, how can I get that contract without competition?

“Hold on!”, You’re saying. “Do I have the right to bid on that procurement?” It’s a free country, isn’t it? Isn’t full-and-open competition the name of the game?

Yes, but there are a number of legal considerations that could prevent you from submitting a proposal. For example, have you or any of your key employees signed non-compete agreements that might prohibit, or effectively prevent, you from pursuing certain work. Check prior teaming agreements and subcontracts as well as any confidentiality agreements that you or your employees may have executed as a condition of getting access to another company’s proprietary data while performing a prior contract. This includes not only agreements with team members, but also those with un-related contractors who gave you access to their data at



the request of a mutual Government client and had you sign a non-disclosure agreement.

If you are thinking of hiring a key employee of a competitor or a key government official connected with the work, proceed cautiously, since such new hires may be subject to contractual or legal restrictions that will make them useless to you. And, whatever you do, tell the new hire not to bring his previous employer’s secrets with him.

“So I don’t have the right to bid?” I didn’t say that. If you find any of the above roadblocks before you, be cautious, but don’t despair. Your lawyer may help you find a detour to your destination, or may determine that the restriction that is impeding you

is illegal. For example, some courts are reluctant to enforce employee non-compete agreements that are overly broad.

Another potential impediment to bidding on a new contract may be Organizational Conflicts of Interest (OCIs). This is a complicated area that could be the subject of several articles or a roundtable, but the key thing to remember is that the Federal Acquisition Regulation (FAR) expresses a clear preference for mitigation over exclusion. In plain English, a contracting officer must give you a chance to explain how you will avoid a potential OCI before the contracting

officer blocks you from competing. Such mitigation might include using subcontractors or erecting firewalls within your organization.

Finally, is the procurement likely to be set-aside for a category of business that you don’t fit into, for example, small business, 8(a), etc.? There may be steps you can take to challenge a set-aside or, better yet, to stop the work from being set aside in the first place. Or, you may be able to get around those restrictions by teaming. But, beware the “ostensible subcontractor” rule which is designed to, and does, catch sham teaming arrangements that are a front for a large business trying to get a small business contract. This is particularly a concern

## Planning your Pipeline: Some Legal Considerations

when the incumbent won the prior contract as a small business but now has become a large business.

...whatever you do, tell the new hire not to bring his previous employer's secrets with him.

Fine, you've figured out that you do have the right to bid. Now ask, "Do I have the right to stop my competitor from bidding?" Essentially, take all of the questions above and turn them on your competitors. If you have reason to believe that your competitor should be excluded, your options include writing a letter to that competitor reminding it of any applicable restric-

tions, filing a protest, or threatening or actually bringing an appropriate lawsuit in state or federal court.

What about getting the contract without competition? Of course you know that there is a law—the Competition in Contracting Act or "CICA"—which requires competition in most cases. But, there are exceptions. In addition to small business and other set-asides which limit competition, an agency may award a sole source contract when there is "only one responsible source." One such situation is where the source submitted a qualifying unsolicited proposal. Another scenario is where the procurement is a follow-on contract for the continued development or production of a major system

or highly specialized equipment and it is likely that award to any other source would result in substantial duplication of cost to the Government or unacceptable delays in fulfilling the agency's requirements. There are other exceptions as well.

Finally, even if you can't stop the competition, you might be able to corner the market—in a legal way, of course. This takes years of planning, though, so we'll save it for another time.

Shlomo D. Katz is Counsel in the Washington, DC office of the international law firm of Brown Rudnick LLP, a Corporate Sponsor of APMP-NCA, specializing in all aspects of Government contracting. If you have any questions about these or other proposal or contracting issues, please contact Shlomo at 202.536-1753 or [skatz@brownrudnick.com](mailto:skatz@brownrudnick.com).



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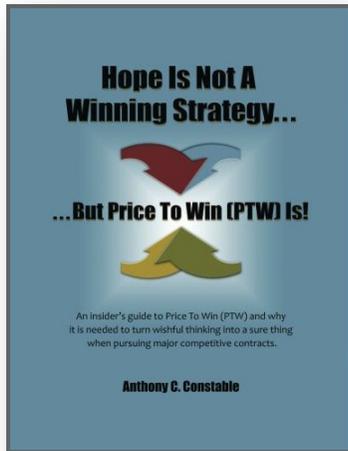
Learn at your own pace anywhere you have internet access. Take time to review reference material that supports learning. The course gives you access to the online *Shipleys Proposal Guide*.

Module quizzes and a comprehensive final exam help evaluate your learning.



# Hope is Not a Winning Strategy... But Price to Win Is! By Anthony C. Constable, 2011

by Brenda Crist, PPF.APMP



A common complaint among proposal professionals is that they seldom get hands on experience building PTW models because Price to Win (PTW) is conducted by a few individuals in the company behind closed doors. *Hope is Not a Winning Strategy...But Price to Win Is!*, by Anthony (Tony) Constable, explains how one of the DC metro area's leading pricing gurus develops PTW strategies using a defined and repeatable model. Tony has long been one of the top pricing professionals in DC, and his company CAI/SISCO has been providing PTW services to clients for more than 30 years.

The book presents a **3-phase and 10-step method for conducting PTW**,

and is divided into 7 sections. Section 1 of the book provides a high-level introduction to PTW concepts such as PTW strategy and gaming theories. It provides definitions for PTW terms like Cost As an Independent Variable (CAIV), Materiality, Provenance, Total Cost of Ownership (TCO), and snowflakes. If you are already familiar with basic price to win terms and concepts, skim this 26-page section, because Section 2 starts presenting the PTW model.

Take your time examining the PTW model in Section 2 on page 29. The graphic is a little busy, with lots of arrows. The model divides PTW into three phases: Competitive Analysis, Bottom-Up, and Fully-Gamed PTW, and there are two or more steps associated with each phase. Sections 3-5 of the book provide detailed descriptions of how to perform each phase of the PTW model. Section 6 provides food for thought on how to apply the model, such as public-private partnerships, incumbency, and the changing federal landscape.

Some of the descriptions are a little theoretical, so I was happy to see that Section 7 provides a detailed description of how to apply the model.

It was refreshing to have a real guru walk you through a realistic case study. As with many bids, you will develop an original assessment, only to watch it change as you gather more intelligence and watch the competitive landscape change. I highly recommend getting out your spreadsheet and following along as the information unfolds.

The book provides many useful tips for completing your PTW strategy, including a list of competitive intelligence sources, a description of how to game your PTW model, and several cautionary tales about incumbents. I found the color of its high voltage graphics distracting, and the \$212.40 cost of the book on Amazon.com may be discouraging. **The book is one of a kind on the market, however.**

This book was written by a noted expert, and will help proposal professionals fill the knowledge gap, as well as prompt them to question how executives in the backroom are developing the company's PTW for a bid.

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 fulltime 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.



# Inaugural Dinner Series Event in January is a Success!

by Cam Middleton

The inaugural APMP NCA Dinner Series event on January 18, 2012, on task order management, was an enormous success, with a strong attendance for this first event of the year. The presentations from our panel of three speakers, covering task order management with insights and tips from the perspectives of small, medium and large companies, received excellent reviews from the attendees. The new location was praised by many as easy to reach from all directions.

The lively event was co-chaired by Dinner Series Committee members Marty Williams, and the moderator Cam Middleton, whose entertaining introductions set the mood for this insightful discussion on a topic that is of interest to all Government contractors. Drawing from their extensive experience in proposal and task order management, the speakers – Lauren



Hammond, Dan Shyti, and Wendy Frieman, presented well-spoken perspectives. This event turned out to be an excellent kick-off for the 2012 Dinner Series.

The Committee would like to thank everyone who was involved to make this event a success. We look forward to seeing you at the next local NCA-APMP event, which is our March Dinner Series at the Tysons Corner

Westin in Falls Church, Virginia. We hope you are planning on coming to this and future events filled with great presentations, delicious food, and plentiful networking opportunities.

Cam A. Middleton has more than 15 Years of professional experience and proposal staffing support and has assisted in staffing more than 1,000 proposals valued over \$200B. He is also an active member of APMP, serving as a National Capital Area Chapter (NCA) Roundtable Committee Member and Roundtable Event Chairperson.

## Fun Fact...

**Smart Horses:** The reason firehouses have circular stairways is from the days of old when the engines were pulled by horses. The horses were stabled on the ground floor and figured out how to walk up straight staircases.

**Sir Walter Raleigh:** Myths debunked – the famed explorer Sir Walter Raleigh is wrongly credited for some contributions to English society. He did not introduce potatoes to England in 1586, as they were first grown in Italy in 1585 and had already spread through Europe. As for tobacco, Jean Nicot (the inspiration for the word nicotine) introduced the plant to France in 1560, and it spread to England before Raleigh had a chance to bring it back. He did not ever lay his coat down over a puddle so Queen Elizabeth could cross. This story is yet another romantic tale of a past that never existed.



# 2012 Proposal Basics Boot Camp!

Build a solid foundation for success  
in one knowledge-packed day!

## Save the Date for APMP-NCA Proposal Basics Boot Camp, April 17, 2012

Are you new to proposal development? Do you have team members who are new to the arena? If so, keep your calendar(s) free on Tuesday, April 17, because the Association of Proposal Management Professionals (APMP), National Capital Area will give you the basic know-how and skills you need to make the most of your opportunities in 2012. Our Boot Camp format has been revised to provide you more options in one day. We are very excited to be able to offer this wonderful opportunity: a complete day filled with valuable information. You don't want to miss it!

*If you are a proposal manager, writer, or coordinator—or someone who does it all—this program is for you.*

- New proposal practitioners with little or no experience in the industry.
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Want to have some ideas for your future career? We now have a track to address your career development.

Choice of tracks:

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Track 2 – Proposal Writing

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*Introducing our new track...* Track 4 – Career Development

**This could be the most productive day you'll spend all year!**



**So many benefits, and so easy to get them all:**

- Learn the most successful practices from the most recognized and respected proposal trainers in the industry, all in just one day.
- Save money with a low registration fee that includes breakfast, lunch, and refreshment breaks.
- Get 5 Continuing Education Units toward your APMP professional accreditation.
- Vendor Prize Give-A-Ways!

**April 17, 2012**

**7:00 a.m. to 4:30 p.m.**

Registration/Breakfast/  
Vendor Showcase  
begins at 7:00 a.m.

**Event Location:**

Waterford at Springfield  
6715 Commerce Street  
Springfield, VA 22150  
(703) 719-5700

For questions about Boot  
Camp 2012 please contact  
Noelle Rzasa at 703.939.1418  
or at [noelle.rzasa@apmp.org](mailto:noelle.rzasa@apmp.org).



NATIONAL CAPITAL AREA

# APMP-NCA Board of Directors Meetings are Open to Members

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

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## Advertising Rates

Page Size	Width x Height	Rate
Full Page	8.5" x 11"	\$500
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A Publication of the Association of  
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