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NCA APMP NATIONAL CAPITAL AREA

EXECUTIVE summary

Summer 2013 | Volume 20, Issue 3

This Issue's Theme: **How did we Get Here? Where are we Going? How do we get There?**

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President's Corner

Proposal Management: How did we get here? Where are we going? How are we going to get there?

by Olessia Smotrova-Taylor

Proposal management has made great strides as a profession in the last decade. It is easy to forget the laments we had a few years ago regarding company leaders who thought of proposals as an administrative job. However, once in a while we get a reminder: When I attended the *2013 APMP International Bid & Proposal Con Chapter Officers Workshop*, a woman from Egypt erupted into a passionate speech about the plot of proposal professionals in the Middle East, where companies still believe them to be glorified admins, while truthfully they are the lifeblood and the growth engine of an organization.

It seems as though we have come a long way here in the U.S. While there may be holdouts in certain markets, at least in the federal community, we are appreciated more. In general, people seem to be more aware of this profession when they ask us what we do. Company management is starting to recognize the need for training more readily. They find that ignorance, with mistakes repeated, is infinitely more expensive.

Academia is catching on as well. Programs have begun sprouting at universities, although some professors report that they are having a hard time gaining recognition for their programs and courses from those more comfortable with more traditional disciplines, such as marketing or finance. Little research exists in the field, although APMP is seeking to fill the gap with the Journal's entire editions dedicated to research. Companies are also recognizing the value of certification, and are starting to encourage their personnel to pursue this route. Which of course, elevates the prestige of the profession.

APMP itself has achieved some spectacular growth, surpassing 5,000 members, and having an unprecedented 716 attendees at this year's conference. It is particularly impressive knowing that this is the year when most companies are tightening their belts resulting in the decline of conference attendances.

Finally, the trend is that the commercial world is transitioning away from handshake deals, and government world is slowly moving away from sole source contracts. Everyone is headed towards strategic sourcing, group decision-making, and complex procurement/sales where a proposal plays a prominent role. With the industry changing across the board, internationally and domestically, we can enjoy the results of the progress, and be optimistic about further positive shifts.

However, some challenges still remain. I recently presented a webinar on *The Top 10 Proposal Management Challenges* (download it for free at http://bit.ly/ZA7NFI). I have collected notes throughout the past eight years, reviewing global survey results, keeping logs, reading professional literature, and attending APMP events,

Management commitment is key to solving this problem when it comes to allocating resources to proposals and changing cultures.

to put my observations together. I have also conducted LinkedIn discussions on the top three proposal management challenges to refresh my information and get a current snapshot of the state of the profession, with the goal of providing a few ideas on how to make lasting changes.

To preface my findings, I was surprised that some challenges did not make the LinkedIn list, but I have heard fellow professionals mention them at the conference:

- Working with remote contributors, and even having writers in foreign countries
  - Adding cultural and lan guage issues)
- Under-resourcing proposals due to poor planning or lack of resources
- Waste of resources due to poor proposal management skills
  - No smart staffing approach, no proposal plan, no checklists, poor kickoff, lack of proposal risk management, and duplica tion of effort
- Waves of layoffs while working the remaining staff around the clock
- Focusing on running the proposal process and turning the crank instead of delving into the content

Here are the top three out of the 10 challenges that made the list:

Challenge 3: The shortage of Subject Matter Experts (SME) on proposals, which leads to no real solution and poor content. Nearly 20 percent of the respondents stated that companies are afraid to ask their customers to let the incumbent SMEs participate in proposals, because they walk on eggshells and are afraid to anger clients. Then, SME proposal hours are pushed to nights and weekends, making participation harder and work less productive. Many companies have cultures not conducive to personnel on client sites helping out. Onsite personnel do not have any incentives to care about company allegiances, and they watch the clock to leave the office. They are not particularly helpful to their employers, and do not have motivation to make a difference. Such employee cultures make our jobs more difficult.

How do we change it? There should be best practices published on good incentives structures for SMEs and business developers. There should also be training and leadership development for talented onsite personnel. Management commitment is key to solving this problem when it comes to allocating resources to proposals and changing cultures. Additionally, there should be good discipline to make no-bid decisions—to walk away from opportunities where the company does not have any SMEs.

As proposal professionals, we can make a difference. The secret is to give ample direction and help SMEs, to take maximum advantage of the little time we get with them; use structured approaches to brainstorming to prevent waste of time; and teach SMEs speed-writing techniques to maximize their usefulness.

Challenge 2: Authors missing deadlines imposed by proposal managers. Nearly 24 percent of the respondents listed this as their number one problem. It seems like proposal managers struggle with lack of training and skills in proposal contributors, and suffer from lack of management support. Their companies take their dear time to decide whether to bid, resulting in a late start, allowing less time for each activity. There may be wrong resources assigned (whoever is available, not whoever is right); resources may not be committed to the proposal enough hours, being too busy with other work; there may be not enough budget or personnel allocated to resource the proposal to win; and resource allocation may be done using a SWAG, not a formula. Proposal contributors may have little training to understand the proposal process and why deadlines are necessary. Proposal managers' clout may be small in the organization. Or, there may be issues with proposal managers' own managerial abilities to compel people to follow their requests.

In figuring out how to solve this problem, it is important to say that enforcing the deadlines is not a one-dimensional whip-cracking job. Regardless of what kind of resources one's team gets, all proposal managers will benefit from training in leadership and management. It is like a Super-Nanny intervention with parents who cannot manage their kids; it is not that the kids are bad; it is the parents' lack of skillful parenting. Our profession will benefit a great deal from advanced proposal management courses to pick up the techniques to get people to honor the deadlines. And again, management support is key to creating a culture where each person in the company takes the proposal process seriously.

Challenge 1: Having none or poor capture effort. To be honest, I am peeved to see that this one keeps emerging as the most problematic issue. Nearly 25 percent of all respondents listed issues directly related to insufficient advance preparation. This is a systemic problem, having to do with lack of business development process maturity in many companies, and lack of leadership's training to understand the importance of capture. It is also related to the shortage of SMEs, and perhaps poor training of capture managers themselves.

Consulting support is always an option in the interim, with in-house capture talent development as a longer-term solution (while using consultants for surges). To fix the root cause of the problem, in addition to proper education for their capture personnel, companies have to actively invest into reaching their business development organization maturity. With APMP's merger with the BD Institute, a new 2.0 edition of BD Capability Maturity Model is out; and, companies should follow BD CMM to build capabilities to add capture as a core competency.

It seems we have made significant progress in the past few years, but challenges remain. Addressing some of the top challenges will help us get to a better place—where hopefully, we grapple with the new realities, rather than being stuck in the same place several years down the road.

Olessia Smotrova-Taylor, AF.APMP, leads OST Global Solutions (www.ostglobalsolutions.com), a Maryland company specializing in business development, capture, and proposal consulting and training. She is the President of the APMP NCA chapter, and the founder of the Bid & Proposal Academy. Ms. Smotrova-Taylor is the author of ***How to Get Government Contracts: Have a Slice of a $1 Trillion Pie***. She led winning bids for four out of the five top government contractors. She can be reached at otaylor@ostglobalsolutions.com.

NCA is Incorporating

Because of changes in the IRS laws, all chapters of APMP are required to incorporate. The NCA Board of Directors is currently updating the chapter's bylaws, which have not been revised since 2001. After adoption, we will file the papers for incorporation in accordance with IRS and guidance from APMP International. The updated Bylaws to be are published on the NCA website: http://www.apmpnca.org/resources.

Ask the Graphics Guru

What is the Best Question to Ask My Future Client?

by Mike Parkinson

There is a question that, if answered, gives you the insight to make sales and win proposals. Of course, there are many questions you might ask your future client (before the RFP is released)—all of which are dependent upon industry, solution, and relationship—but this is the most revealing single question I have heard.

I was invited to teach a class with Dr. Robert Frey, author of *Successful Proposal Strategies for Small Businesses*, at University of Maryland Baltimore County (UMBC) in association with *TargetGov*. During our class, Dr. Frey said that, when possible, he always asks future clients a very specific question (the wording is important),

"How would you paint a picture of success on this task/project/program now and going forward?"

This question, according to Dr. Frey, uncovers a spectrum of critical information. I could not agree more. Below are four reasons this question must always be asked:

1. Asking the future client to "paint a picture" encourages them to visualize the solution. In doing so, emotions are heightened and there is a more profound understanding and communication of their goals and challenges. The future client's deepest hopes (benefits) and biggest fears (risks) are often shared.
2. The future client gives backstory and connects the dots. They may also share unstated needs and concerns. For example, an RFP may read, "The offeror shall include three examples of quality control (QC) measures that eliminated errors on similar programs." When asked the "paint a picture" question, the future client may reveal they had great pain in the past due to poor quality control. Specifically, the QC process was skipped. Therefore, the examples should demonstrate that the quality control process would be adhered to in any situation. The question uncovers the logic behind the RFP requirements and exposes what keeps the future client awake at night.
3. The words success, now, and going forward included in the question help to reveal short and long term considerations in the answer. Has the future client thought months, years, or decades ahead? How far into the future? Is the path from today to tomorrow clear? Now is the time to know.
4. The answer to the question ensures the future client and the solution provider are on the same page. For example, if I asked you to think of an office chair, what do you picture? If I ask another person to think of an office chair, do you think they will picture the same chair? Unlikely. For this reason, it is wise not to assume anything. Remain curious and ask clarifying questions so you can visualize the picture your future client is painting. Most sales documents and proposals fall prey to two egregious errors. Practice the following to avoid making these mistakes:

a) Never paint part of their picture. If they are stuck, help them paint it themselves. You want the future client to be 100 percent invested in their depiction of the solution, which you will deliver.

b) Never paint your picture and hope you can convince the evaluators or decision makers that your solution should be theirs.

Next, Dr. Frey recommends creating a graphic that clearly illustrates that vision. Use the future client's exact words and ideas in the graphic. Then, use this graphic as your roadmap.

Dr. Frey has had great success asking this simple question. Follow his example and you will as well.

Mike Parkinson, PPF.APMP, is an internationally recognized visual communications expert and APMP Fellow. He is a partner at 24 Hour Company (24hrco.com) specializing in bid-winning proposal graphics. His Billion Dollar Graphics website (BillionDollarGraphics.com) and Get My Graphic website (GetMyGraphic.com) share best practices and helpful tools with proposal professionals. Mike Parkinson can be reached at mike@24hrco.com or call 703-533-7209.

Congratulations to the NCA Chapter on the Special Recognition Received at the International Conference in May!!

APMP NCA was awarded the APMP Chapter Communications Award 2012, honoring the chapter that provides outstanding content and value in communications (newsletter, website, email blast, social media, or other communications means) to its members, APMP International, and fellow chapters.

A special award, the John Elder APMP Journal Award, formerly the APMP Insight Award and named after the former managing editor of the APMP Journal who passed away in August 2012, was awarded to ***Chris Simmons for his article How to Create Winning Proposal Themes (Fall/Winter 2012 issue).***

The 2013 APMP Fellows Award, a lifetime achievement award nominated by peers and honoring APMP members who have made significant contributions to the industry and APMP was granted to just two individuals this year:

Chris Kaelin *(left image) and* ***Chris Simmons*** *(right image), shown with Beth Wingate, Rick Harris, and David Sotolongo.*

How to Survive and Thrive in a World of Change: The Road Map of a Proposal Manager

by Betsy Blakney, PPF.APMP

Whether it's embracing change in a volatile market, mentoring and/or coaching fellow colleagues to up their game, collaborating to create best practices and squash ineffective ones, or working across disparate organizations for mutual success, the call for proposal development professionals to shine and thrive in the workplace has never been more compelling.

With valued insight and passion for the possible, let me take you on a journey to see how a public school teacher transformed her first career into a second one and landed her dream job.

Making the Most of Your Talents—Successful Career Transition (How did we get here?)

Groomed as a physical education teacher and coach, I had numerous opportunities to shape young minds, mold good and bad behaviors and develop strategies for using my competitors' weaknesses and my teams' strengths to an advantage. At the high school and college levels, I taught and coached high performance teams to victory and felt the sheer joy of winning as well as the agony of defeat. I applied lessons learned and came to know over time that simple, well-defined strategies generally resulted in winning.

What brought me to the Washington metropolitan area was what I considered a chance of a lifetime – the opportunity to work at the national headquarters of my (then) professional association. Here is where I grew as a leader for someone saw potential in me—perhaps more than I believed in myself. After several years of soul searching for where my education career would take me, I walked away (cold turkey) just prior to entering a Ph.D. program and began searching for knowledge outside my comfort zone. Having minored in Instructional Communications, I took a calculated risk and embarked on an entry-level marketing job, teaching executives how to conduct themselves during video conferences, to start down the path to improve my business acumen and give me a more universal view.

> "DON'T BE AFRAID TO FAIL.
>
> BE AFRAID NOT TO TRY."
>
> *—Michael Jordan*

I seized every opportunity that presented itself. I was fortunate enough to align with an entrepreneur fresh out of graduate school and changed jobs three times to follow his dream. He recognized early on that my soft skills—my people skills - were completely transferable and would be an asset to any future relationships we needed to establish.

While my leadership, managerial and communication skills were well developed, I wasn't as business savvy as I needed to be to survive in such a competitive environment.

When jobs dried up or businesses were sold, I made targeted decisions to learn more about what I didn't know that I believed would help propel my career and make me successful. Even though I had two degrees and two teaching certificates, I enrolled in night school to learn accounting skills and budgeting, which landed me jobs in two different companies as Supervisor, Account Receivable and Supervisor, Accounts Payable, respectively. In between layoffs, I took a job as a HVAC dispatcher to learn the harsh realities of customer service (or the lack thereof) and against the advice of my friends became a new-used car sales consultant to learn the formal sales process. I'd worked part-time nights as an "ups" girl/greeter in the showroom of an automobile dealership when I first moved to Virginia to help pay the bills-the culture shock of moving from upstate New York to Washington was a bit costly, so I understood the business. I never considered any of these side-steps career-limiting moves.

TELL ME,
AND I'll FORGET.

SHOW ME,
AND I MAY REMEMBER

INVOLVE ME, AND
I'LL UNDERSTAND.

From being a customer account coordinator to an instructional systems designer to a program administrator over the years, I made a smooth transition from one skill set to another and finally secured a job in the burgeoning IT industry that put my organizational and administrative abilities to the test. On a proposal effort where I was serving as a writer, the proposal manager made a fatal mistake of sending the bid out to the US Postal Service via FedEx. Not long for this world, his position opened up and I was fortunate to be offered the job. My former training, sales and negotiating skills would now pay off. A proposal manager is who I would become.

Advice For Those Looking to Make a Transition—Either Lateral or Up the Ladder:

- Determine what satisfies you; ask what do you enjoy doing and then pursue it
- Take some calculated risks and hit the ground running
- Surround yourself with interesting people. Everyone has something to offer and who you know is just as important as what you know

Taking Responsibility for Your Own Professional Development—Stop Whining and Make a Commitment (Where are we going?)

Like many of you, I have been right-sized, down-sized, and RIFed over the years. I have also greatly benefited from corporate acquisitions. Throughout all these job changes, one thing has kept me whole—the relationships I developed along the way. Much like selling, building and maintaining relationships is key to one's success and survival.

I had no reservation about becoming a proposal manager. I knew I had lots of opportunities for training since I had negotiated that as part of my condition of hire. With many courses and/or workshops available, I joined APMP's National Capital Area Chapter to align myself with like people and learn from the masters. An active participant in the now silent APMP Mentoring Program, I've had great mentors along the way from all disciplines, each with his or her own spin on how to win in this business. Some were generous in sharing best practices, others allowed me to shadow their activities without fear of me walking away with company secrets and many stuck their necks out to encourage me to become more active in the association and its mission.

I followed their lead and invested my time and energy in the profession. From serving as the President of the NCA chapter to becoming the Chief Executive Officer of APMP International, I believed that one of the best ways I could make a difference in the profession was to give back to the community that allowed me to prosper. I wholeheartedly supported the development of the APMP Accreditation Program and continue to offer my services as a mentor for those looking to achieve certification

"Before you are a leader, success is all about growing yourself. When you become a leader, success is all about growing others."
— Jack Welch

at whatever level. I have previously spoken to the NCA chapter on why certification matters and what actions you can take to create more distinction for yourself while creating greater value for your organization. For many of our colleagues, the APMP Certification Program has allowed them to build their self-confidence and self-esteem, enhance their knowledge and professional standing and improve their advancement opportunities and employability.

No two proposal professionals value the same thing. If you are a young professional looking to define who you are, you might join APMP and align with one of its chapters to make connections, to help you decide which career path to take or develop a professional identity. If you are a more experienced professional, you might be looking for a greater return on your investment (e.g., justifying membership dues and your volunteer time) or looking to expand your network to market your skills or products to further your personal and organizational goals.

No matter what your motivation is, take responsibility for your own professional development. Examine your own strengths and weaknesses; define what makes you unique and build expertise by increasing your knowledge bank (mine has too many withdrawals and deposits to count up). Don't wait for an annual performance evaluation to document your achievements. Conduct a lessons learned session on your own accomplishments and failures and do something with the information to either advance yourself or others.

Advice on Empowering Yourself to Become the Best You Can Be While Inspiring Others:

- Invest in yourself! Whether it is through self-study, online or instructor-led training or embarking on a certification program
- Enter mentoring relationships sometimes as the mentee and other times as the mentor—Give more to get more
- Share your experiences—good and bad—with someone just embarking on a proposal career—reflecting on your past and what got you here can be refreshing and eye-opening
- Participate in professional association activities to exchange ideas, learn from others and advance the mission—A succession of good ideas leads to fresh perspectives

"Future-Proofing"[1] Your Career– Choose to Stand Out (How do we get there?)

There is much guidance and research on shaping one's career to suit your personality or getting noticed for the right reasons and receiving the recognition you deserve. However, to stand out from others in your organization, you must also build a reputation-one based on integrity, trust and commitment.

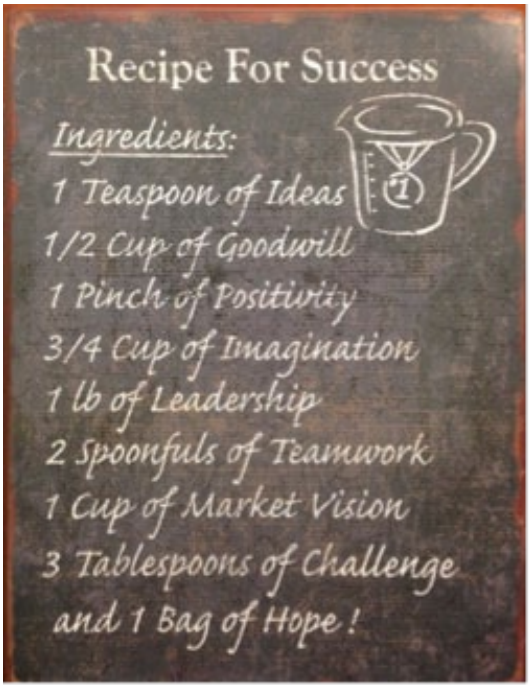
My proposal teams and I have a special relationship. From day one, they understand my motivation and what my expectations are. We have shared values and goals with winning as the desired outcome. They appreciate that I care about them and know that I would "go to bat" for them—we have a connection.

I encourage a positive atmosphere where colleagues with a diverse set of skills and abilities feel valued and accepted even when their idea comes under fire or ends up in the shred bin. Whether it's engaging in lively debates about strategy, teaching them how to storyboard or discussing the pros and cons of using a past performance citation, we work together to deliver proposal excellence.

Advice on Taking the High Road and Embracing New Beginnings

- Take a quick inventory—Assess where you are and how to get to where you want to be
- Determine what trade-offs you are willing to accept—Ask yourself if you are ready for a promotion or a change of venues
- Seek out effective networking opportunities to build rapport, establish bonds, and explore what might be possible—Envision a brighter future

[1] Concept introduced by Mind Tools CEO, James Manktelow in Future-Proof Your Career an e-book published by MindTools Ltd, London; © Mind Tools Ltd, 1996-2013 All rights reserved.



Even as a well established proposal professional, I still enroll in leadership training, take opportunities to improve my speaking skills and engage in enhancing my social media exposure. I look for opportunities to learn more about advanced facilitation techniques and team building. Above all, I remain vigilant in my quest to be one of the "best athletes" in my company working diligently to solidify the relationships that are at the core of my personal and professional success.

Advice on Learning How to Thrive! Succeeding at the Crossroads of Life and Finding Harmony:

- Take better care of self—Make a commitment to yourself first—Make time to work out, relax and plan for the day ahead no matter how challenging
- Learn how to walk into a room of strangers with confidence
- Accept challenging assignments—Take pride in your accomplishments and strive for more
- Reassess often—Ask yourself if the work you are doing is rewarding, interesting, and fun
- Don't ever stop learning—Subscribe to a number of blogs, podcasts, websites and eNewsletters to stay fresh and open to new ideas. Build and/or revamp your professional library to draw inspiration from

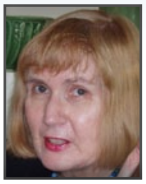
In these uncertain times, keeping your options open is essential to find fulfillment. You need to be at the top of your game. Dust off your resume if you haven't updated it in a while and optimize your strengths. Attend a professional conference or networking event to learn what the trends are in the industry, sign up for a webinar in an area where you need to bolster your skills, or read a newsletter or blog that provides the necessary tips, tools and resources to help boost your personal brand and your career. Spend time focusing on what you can control and prepare for "disrupting" your career to realize your full potential.[2] If you perceive that action as too risky, make small and consistent changes until you see an impact. Focus on recognizing and capitalizing on opportunities when they present themselves. Cascade a positive attitude!

With foresight and careful planning, I go about my business of being a trusted advisor and take a proactive stance when it comes to my future goals and whether or not I am continuing to make a valued contribution. I recommend you do the same—deliver on what you promised your employer, or your client base, and your family and friends and "future-proof" your career by learning how to survive and thrive in clear or stormy weather.

> *"It is not the strongest of the species that survive, nor the most intelligent, but the one most responsive to change."*
> *— Charles Darwin*

[2] Concept derived from "Disrupting" Your Career - Finding a Rewarding Career Path article by © Mind Tools Ltd, 1996-2013 All rights reserved; http://www.mindtools.com/community/pages/article/disrupt-your-career.php?printFriendly=1

Betsy Blakney, PPF.APMP is an APMP Fellow, Accreditation Mentor and a former APMP CEO. Her proposal professional career path includes serving as the APMP COO, Board Secretary and Eastern Regional Representative. She came up through the ranks as the APMP National Capital Area (NCA) President in 2003 and served as NCA Secretary/Treasurer from 2001-2002. With 17 years of experience managing, writing, and producing winning proposals, she currently is a Senior Proposal Manager for CACI, INC.- FEDERAL. Prior to joining CACI, Betsy was the Director of Proposal Services for UNITECH (acquired by Lockheed Martin) and served in the Washington Federal Practice of PricewaterhouseCoopers (PwC) as a Federal Proposal Manager in the Sales Strategy Group. Her career as a proposal manager started at Datatrac Information Services, Inc. (acquired by CSC) when she was promoted from an assistant program manager. Betsy earned her BS degree from Ithaca College, Ithaca, NY and MS degree and Certificate of Advanced Graduate Study from Springfield College, Springfield, MA. She is a certified K-12 physical education teacher, certified driver education instructor and certified proposal professional. When she is not planning her retirement, Betsy can be reached at bblakney@caci.com



From Many Keyboards, Becoming a Proposal Professional

by Victoria Hill

I have worked on proposals from many keyboards – with many job titles and roles. Each keyboard was attached to a project that in retrospect led to all the others.

I participated in my first proposal on a snowy day in Northern Virginia and actually this first time there was no keyboard. I was an IT analyst; my work on defining a task order management process had been slated for inclusion in a proposal, and I was directed to arrive at a studio a few days later. Yes, a studio because my first proposal was a video presentation. Winter in the Washington, D.C. area means unexpected snowstorms. Of course on the scheduled filming day a huge snowstorm was coming. That's the reason I arrived at the studio very early and sat around observing how everything was set up, especially the teleprompter. When my turn came, somehow I naturally presented everything to the camera as needed, and no one was more surprised than I. We won; I received a bonus and bought a Tiffany lamp I had been admiring.

My takeaways from the snow day experience – proposals are fun, ad-hoc and can be rewarding. I did not think too much about it when my kittens broke the new lamp – but was it a sign? My future in proposals – many projects, many keyboards, scary but exciting writing athletics and long hours, I could not yet see.

I kept gravitating toward the documentation part of all my projects. As an analyst, I observed a fellow analyst and a technical writer in a fist fight in the hall. Agreeing on how to write up technical information was not for the faint of heart, I thought. But still I found the field of technical communications fascinating. For many of my projects I recorded and structured team research and findings on my own. I then frequently found myself in a position to come up with the just-in-time words that satisfied our deliverable requirements. The practice of doing all the documentation at the end stood me in good stead for proposal work.

My next many-jobs involved contributing to proposal technical solutions. I was usually my own SME. Pride would not let me do what so many of my colleagues were doing – just rewrite whatever the SOW said with a slight nod to the technical solution. Or, just write the techie view with a slight nod to the SOW requirements. I always wanted to add something unique within the required parameters. I did not know anything about win themes, discriminators, value-add and on and on, for no training was offered or thought to be needed.

My takeaway – I wondered how this proposal writing should actually be done. I had always survived, but sometimes just barely. Still I persevered. To most of the technical people, proposals were an unwanted but accepted burden. To me they were becoming intriguing.

Then the projects and keyboards started multiplying and some formal proposal guidance came into my life. It all happened because I joined a group that wore many hats. We donned our proposal hat whenever anybody requested support, and the rest of the time we were just regular project delivery support. It was hoped that we would win proposals, work some of those delivery jobs for a time, and then contribute to the recompete, or go write proposals in a similar area. This did happen, but the result was working seven days a week. The company realized it had a low win rate, despite heroic efforts by everyone involved, and invented its own proposal wrangling tool. It was geared very much to proposal content reuse and making the transition from proposal to (hoped for) project launch easier since the content had its own little boxes. I got to be on the team that helped the rest of the projects learn the tool. One flaw was that the tool's underpinnings were horrendously complex. But I had seen a big process that actually put all the pieces together.

My takeaway was that content could be wrangled successfully within a bigger picture. I only had to streamline my contribution to create the right words for the right box. I used my new survivalist techniques as SME/writer for small sections. Although there were many benefits from bigfoot approaches, at the end of the day it was just me and my keyboard.

I moved into freelance proposal support and early-on encountered the most difficult information organization task I ever had. It was lowly resume-writing but the task turned out to be a fine test and extension of my hard-won techniques. The first reason it was so hard is that it was soup to nuts for each assigned candidate. The street resume, wrestled from Recruiting at approximately the right time, had to have multiple passes as it transformed into the official template. Each pass had good ideas, but also had its own perspective. The candidates were usually happy to help, but the checklist matching job requirements to concrete skills, training and experience, was forbidding. Even though I had a lot of good IT background, the technical areas all required their own research rounds before I could speak somewhat intelligently. These little research rounds actually had their own logic and steps to assimilate new information, and my evolving techniques held up pretty well.

Then the actual writing in the desired format could begin. However, everyone on the team soon ran into the same problem: all of the candidate experience statements (over multiple jobs) had to fall into the pre-pasted technical language for each major SOW requirement that was relevant to that job. That's why everyone's first draft was many pages over the three-page limit. If the writer was not sure of what the devilishly complex requirement was really saying, they put most of the experience there just in case. Finally, push came to shove for me with a high-priority request to trim eleven pages down to three.

There was no getting around it – a new technique was required, and quickly. So I went to ground and reinvestigated each technical area to see what it really meant. Here I often used government management publications to get one or two sentences I could really trust and understand. In fact, I realized that even though it was a resume, a tiny introduction could set up multiple subsequent experience statements so that I could feel secure in deleting some that I now knew were irrelevant. It took a complete rewrite – there was no way the condensation could happen without it.

So all the keyboard agonizing has had a good effect. My biggest takeaways are :

1. **Understand the big picture as much as possible. This includes teleprompters, Shipley, APMP, and many other tools, approaches and products.**
2. **Once all the machinery has been set in place, there are always going to be new information organization and writing challenges. Taking them step by step and creating new techniques can solve many of them.**

Vicki Hill has been an IT Analyst, Project Manager and writer supporting large program acquisition activities for DoD, FAA and NASA. Having some insight into the government's view of what contractors should do helped in many proposal writing jobs. Sustaining forces are a determination to bring structure and creativity to writing projects, and learning from proposal professionals.

I've Been Preparing My Whole Life for This—What's Next?

by Tim Pepper

How did I get here? The short version — I was a young former US Navy Sonar Technician working as a Field Service Technician for a medium-sized defense contractor. The work spanned equipment installations, troubleshooting, repair, and testing. The local director firmly believed that everyone should learn to work on proposals. I was assigned to work past performance for one, resumes for another, and technical approach for yet another. Someone noticed my ability to distill the essence of a topic into meaningful proposal content and I became one of the people frequently tasked to support bids around the company. Several years followed with me working a full-time day job as a line manager for logistics programs and supporting proposals over nights and weekends. I took an opportunity to move into a full-time proposal position in 2005. The rewarding work on a steady stream of task orders and larger contract pursuits occurs within a structured framework with fresh topics encountered in varied environments for Navy and Air Force customers. During my 23 years working for defense contracting companies serving in a variety of roles ranging from technician, supervisor, manager, and proposal participant along the way, specific milestones stand out as markers for change.

For my first proposal, the director set the tone. "For the next two weeks, we will be sequestered in a dedicated space to focus on the proposal. The contract represents our survival. We will do everything we can to win. Tell your customers you'll be offline. Make arrangements to delegate duties in the meantime. No excuses."

The entire proposal team worked from the central location. The process elevated my awareness of the magnitude of effort to get a proposal accomplished and strengthened working relationships for all involved. We discovered customer success stories that supported "Why us" selection. We worked through process flows that clearly presented our approach and became incorporated in our business model. People had been following structured processes by habit, this was the first time they were written down. We won the contract and a few others in quick succession. The lockdown model became part of our corporate culture. We applied it to almost all major pursuits and created modified versions for smaller bids. Lessons learned from the first lockdown fostered process refinements and aided development of in-house proposal training tools.

Proposal training evolved over time. We moved from in-house training where we tried to build our own best practices to seeking outside sources. Industry leaders like Shipley Associates and organizations like APMP validated the proposal truths we had discovered through trial and error. Our company invested significant resources to evangelize the proposal message across a broad base. A majority of the work force received proposal training of some type. On the application side, every employee was fair game for proposal assignments. Proposal activities became part of managers' performance evaluations. The meaning was clear—proposals are vital to survival and growth—participate or suffer the business consequences. Corporate acquisitions and mergers changed company names and size, but the core proposal culture persisted.

Proposal training investment continued with internal and external seminars, courses, corporate retreats, and conferences targeted to develop the current teams and grow the bench strength of the next level participants. As our proposal execution process matured, topics expanded to cover the full business development life cycle and began focusing greater attention on the capture phase. Bid/no-bid decision criteria became more stringent. Contract opportunities grew larger, included more complex work requirements, and stretched our capabilities. Teaming became essential. Building teams based upon solid qualifications instead of a social network basis involves greater critical thinking and tough decisions.

How do we get there? My personal development has been aided by active engagement with APMP. Since moving into a full-time proposal work in 2005, my own growth has been facilitated through exposure to the organization, its events, and chapter activities. Articles shared by other professionals inspire, challenge, and validate our essential role for business growth. Chapter meetings offer a chance to further network with others in the field with selected speakers informing on relevant trends. Conferences provide the opportunity to engage on an international scale with leaders in the field and return to our organizations energized and excited to engage on bids with fresh ideas.

My advice, keep learning and share the excitement. Every proposal is an opportunity to learn something. Engaging with different people across the team is exhilarating for me. Adapting communication styles to draw out relevant data nuggets from the experts grants opportunities to learn about their work and teach proposal processes at the same time. Subject matter experts are often surprised that the nuggets they provide are so valuable. They are immersed in the environment and shrug them away as commonplace. Guiding them through proposal development allows them to discover and recognize their own valuable contributions to their customer's success in a new way. They often return to their day jobs energized and looking for chances to further enhance their programs. As a result, their involvement does more than simply help win another contract, the customer benefits from their renewed motivation. Proposals are awesome!

Tim Pepper applies over 19 years of experience in capture, proposal, and program management for the Federal and DoD markets. He is a Senior Proposal Manager and Proposal Center Manager for General Dynamics Information Technology in Chesapeake, VA. He leads proposal development (managing, writing, editing, and producing) for pursuit and capture of large corporate strategic and tactical bids involving multiple divisions and subcontractors. He holds a Bachelor's Degree in Business Administration/Computer Information Systems from Saint Leo University and is AM.APMP certified.

Fun Fact...

The name of the dog on the Cracker jack Box is Bingo.

Proposed LinkedIn NCA Discussion Group Guidelines – *Updated February 9, 2013*

The following guidelines will be posted to the NCA LinkedIn discussion group upon approval by the NCA Board. Once the guidelines are posted, an email blast will be sent to the group, informing them of the new guidelines and requesting compliance. The guidelines will also be shared with APMP International as a courtesy.

NCA LinkedIn Guidelines

Please adhere to the following LinkedIn guidelines for APMP National Capital Area Chapter (NCA) group discussions/polls, promotions, jobs, and requests to join.

Discussions/Polls

1. Discussions, information sharing, questions and answers, and other dialogue are highly encouraged. Please include the content of your discussion in the discussion title and details, and not via a link to an external website. A link to an external website can be only provided if the content of the discussion doesn't fit in the allotted word count, and additional materials can be found at the website. A link can also be provided pointing to additional materials helpful to the discussion.
2. Do not insult, berate, or lecture others. Respect their views and beliefs and always consider the impact of your contributions.
3. Avoid discussions and polls that are not directly relevant to the group (including advertising, self-promotions, or spam) will be deleted by the NCA Group Manager.

Promotions

1. Product, service, and event promotions are allowed, but can be posted in Discussions only if they do not detract from the overall quality of the group dialogue. They have to clearly benefit the members. They should be structured in a way that promotes dialogue, feedback, and other discussion responses.
2. APMP-NCA event Promotions are strongly encouraged in Discussions.
3. Other promotions posted to Discussions, that are not relevant to this group and that don't follow the guidelines above, will be deleted.

Jobs

1. Job postings are encouraged, but must be relevant to the group or will be deleted.
2. Please remove job postings once they have been filled.

Requests to Join

1. We welcome business development professionals from all job functions, all seniority levels, and all geographies who have a genuine interest in contributing to the group.
2. LinkedIn members with no obvious connection to this group, or those flagged as having zero (0) connections, may not be allowed to join the group.

We reserve the right to block or exclude any LinkedIn member who repeatedly infringes upon these group guidelines.

Participate. The most important guideline for this or any social media group is to participate. Please generate Discussions, Polls, Promotions, or Jobs and "Like", "Comment", "Follow" , "Share", "Flag" (Promotions/Job), or "Reply Privately" as appropriate to increase the value for you and other group members.

Suggestions? These guidelines have been established to increase group participation and value for current and future group members. If you have any suggestions for improving the group, including amendments to these guidelines, please contact Chris Simmons, LinkedIn NCA Group Manager at chris@rainmakerz.biz, or 202-255-2355, or Bridget Skelly, APMP-NCA Marketing Chair at bridgets@apmpnca.org or 703.431.4423.

Legal Corner

Proposal Professionals: Where Are We Going (and What Can We Take With Us)?

by Shlomo D. Katz

As the proposal profession ponders where it is going on a macro scale, individual proposal professionals may be weighing that question on a more personal level. Whether you are a freelancer looking for your next gig or employed in-house by a mega-government contractor, you are faced with the question: What information, approaches, templates, etc. can I take with me to the next place I work? Contractors, on the other hand, should be asking what they can do to protect themselves against losing valuable proposal know-how.

The first, and most obvious, place that both parties should look for an answer to this question is the contract or employment agreement and any non-disclosure agreements (NDAs) they signed. An employment contract or consulting agreement may state that the company owns all work product, or it may define who owns what, or it may be silent. Likewise, an NDA may prohibit an employee or consultant from disclosing certain information of the company outside of the company, or even inside the company, except on a need-to-know basis relating to a business purpose of the company.

What information does an NDA protect? Only by reviewing the scope of the NDA together with all surrounding circumstances can one be certain. An NDA is supposed to protect confidential information. Thus, it is necessary to ascertain what information the NDA defines as confidential. The specific types of information that are considered confidential will vary from company to company. Typically, however, this is information that would provide a competitive advantage to a person or entity outside of the company.

In order to qualify as “confidential information,” the information must be . . . in a word, confidential. The holder of trade secret or other confidential information can lose its proprietary rights in protected information if the information is disclosed without protecting the confidentiality of the disclosure. In other words, protected information is no longer protected when it becomes general or public knowledge. For instance, when the information has been disclosed in a trade journal or left behind on a seat in the Metro, it is not likely to be treated as confidential. It does not even matter whether the disclosure was intentional or not; once the information is in the public domain, it arguably has lost its confidential status. See, e.g., Digital Healthcare, Inc., B- 296489, 2005 CPD ¶ 166 (information available on contractor’s website is not confidential). Thus, an employee or consultant need not blindly accept a company’s claim that something is confidential. Rather, if the employee knows that the information is public, the employee may be justified in treating it as being non-confidential.

In fact, even before the information has become public, it may be difficult to argue that it is confidential if the company has not taken commercially reasonable steps to protect its confidentiality. For starters, companies

It is in an employer's interest to be sure that its new hires are not bringing confidential information from their former employers to their new jobs.

should mark the information as "confidential." Information on a server can be protected by requiring users who log-on or who call-up certain information to accept a confidentiality statement before gaining access. If every employee in the company can log-on to the server that houses a company's proposal "memory" and can print, copy and email those materials at will, the company may be hard-pressed to argue that the material was confidential. It is important, therefore, for a company to control employees' and consultants' access to information that the company wishes to argue is confidential. It goes without saying that companies also should control the access of your subcontractors and teaming partners to information in your proposal center of excellence. See, e.g., Accent Service Co., B-299888, 2007 CPD ¶ 169 (information was no longer confidential after it was disclosed to visitors to the contractor's office). Again, if the individual with access to the information knows that the company has failed to protect that information, that individual may have rights to use it.

Another strategy that some companies use is to have their employees sign non-compete agreements which limit their ability to become, or work for, competitors after they leave the company. Note that, while laws vary from state-to-state, some courts may consider non-competes to be against public policy. Thus, in order to be enforceable, a non-compete agreement should be written as narrowly as possible (in scope and duration) to protect the employer's legitimate business interests without hamstringing the employee from earning a living in his or her chosen profession in the future. Ironically, in some states, the best thing that could happen to an employee is to be forced to sign a non-compete that is so broad it prevents him or her from working at all.

Finally, an aside relating to non-disclosure and non-compete agreements. It is in an employer's interest to be sure that its new hires are not bringing confidential information from their former employers to their new jobs. If you are that new employee, don't assume the new employer wants the documents in your briefcase or in the trunk of your car. Employers can, and do, sue their competitors when former employees take confidential information to the competitors, and damages can easily be in the millions of dollars. The former employer may even seek an injunction to keep the new employer from participating in a procurement because the new employer has been tainted by purloined confidential information. Whether the defendants win or lose, such litigation is expensive, and it distracts contractors from doing what they want to be doing--winning contracts and making money. For the proposal professional, it could be a career-ending event.

So, good luck with that new job. As a wise man once said, "You can't take it with you"—at least, not all of it.

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. Shlomo has spoken at APMP's Proposal Basics Boot Camp on topics including: "Why Do We Do What We Do? Understanding the Theories and Formalities Behind the Procurement Process." If you have any questions about these or other proposal or contracting issues, please contact Shlomo at 202.536-1753 or skatz@brownrudnick.com

From Here to a Career

by Christy Roach Hollywood

"So, how did you get into proposals?" is a common icebreaker question heard at APMP events. Every story told in reply differs, but many include an element of serendipity: "There was a need and I filled it," or "I just kept getting pulled into bids." However, as bid professionals consider their next career steps, personal experience and research have shown a little planning goes a long way.

Anecdotal evidence shows three major career paths from proposal coordinator or proposal manager roles as shown in Figure 1 below.

Real-life examples include a former proposal coordinator who honed her skills, received accreditation, became a junior proposal manager, and now is running a small proposal shop. While I chose to move through a traditional BD career path as well (to market strategy), many of my team members have jumped at junior, mid, and senior level to the project/technical tracks. One proposal associate left our team to take a one-year international fellowship at another organization and transition to the project side of international development. A long-term BD director saw a market opening in his prior water and sanitation field and, while at the same firm, gradually moved back to project work as awards in that sector came in. Less often, but also common, is the transition from BD to corporate communications or – for those pricing specialists among us – to finance.

Each of these shifts required planning: Identifying a desired result, then listing milestones and methods to achieve the outcome. If this sounds familiar, it is because it is similar to techniques used to create a proposal calendar, a technical approach, a project management plan, or a capture strategy. The skills that make great proposal professionals can be used to further your own career.

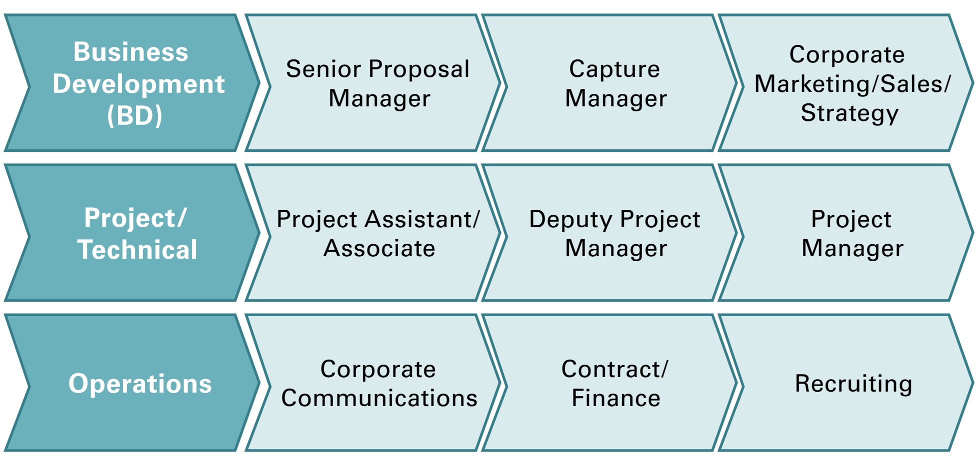


Figure 1: Career paths for proposal professionals

Whether individuals jump between career paths, or grow within one track, depends on the alignment of skills, personal interests, and organizational needs.

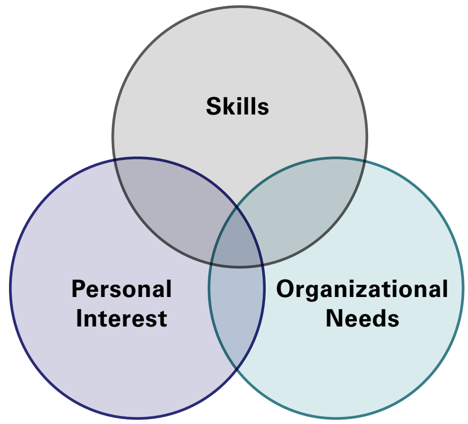


Figure 2: Career planning benefits from alignment.

BD professionals can impact their own career path by learning or improving skills, whether through pursuing a formal degree or certification, participating in professional associations such as APMP, taking advantage of internal training, and – often most effective – mirroring or asking to be mentored by someone with a skill set you want to grow. In addition, individuals can identify the specific organizational needs that would require their skills and align with their personal interests to create a target profile for their next employer. Informational interviews and networking should then follow, as you work to shape future job postings.

This anecdotal evidence is reflected in many recent studies and analyses.

Numerous articles have come out during the economic downturn discussing career planning. These include:

- "Career Plans Are Dangerous"[1]
- "A Campaign Strategy for Your Career"[2]
- "Job Hopping to the Top and other Career Fallacies"[3]

Each provides nuggets of wisdom that apply to bid and proposal professionals.

"*Career Plans are Dangerous*" has a provocative title and was quickly picked up by the business press.[4] As proposal professionals, we know from hard experience that flexible planning leads to better results. Many lay people, however, plan in ink rather than pencil. In uncertain times, being too specific and focused can be detrimental and limiting. This study, however, stressed that employees should focus on long-term big picture, skill set goals rather than specific future titles at specific firms. For example, a great proposal manager wants to do more pre-solicitation, capture-related work. While his team and project management skills readily transfer, he knows that he would need to develop new skills, such as understanding of the sales/BD process, competitive intelligence, or pricing strategy. By having a broad goal, he can work backward from the end date and set milestones1. By focusing on skills, regardless of title or market conditions, he can achieve the desired new type of work.

The second article, *"A Campaign Strategy for Your Career,"* plays off political campaigns, stressing the need to "set clear goals, reach out to supporters, build and exercise influence, and then execute relentlessly to achieve your ambitions." It goes on to explain people should own their careers, focus on the long-term, and take action now. The author here, though, really pushes the need to build your network in a thoughtful, well-planned way to achieve career goals.

In the last article, *"Job Hopping to the Top and other Career Fallacies,"* author Monika Hamori reported on an analysis of 14,000 executives. She uncovered that frequent job hopping did not lead to improved career outcomes and lateral moves (rather than promotions) happened more than predicted. She also learned that professionals do not usually stay within one group of similarly sized and respected peer organizations; they often take positions with smaller organizations where they might have greater impact or tackle a larger role. Her main conclusion for APMP, however, was that those who changed functions or industries faced no real penalty when compared to those who stayed in the same function or industry. Dr. Hamori's research shows that, for example, proposal professionals can switch tracks without falling behind the career paths of their peers. This is good news for former technical staff wanting a career in the BD track, as well as for proposal staff wanting to jump to Operations.

In summary, proposal and BD professionals can take control of our own career goals, create a flexible plan, leverage our broad networks, adjust our approaches when the unexpected occurs, and hold ourselves accountable. We can be comfortable making lateral moves while learning new skills, knowing it is all part of a long-term plan to capture the career we want.

[1] Leonard A. Schlesinger, Charles F. Kiefer, and Paul B. Brown. "Career Plans are Dangerous" HBR Blogs, March 2, 2012. http://blogs.hbr.org/cs/2012/03/career_plans_are_dangerous.html

[2] Clark, Dorie. "A Campaign Strategy for Your Career" HBR, Nov. 2012. http://hbr.org/2012/11/a-campaign-strategy-for-your-career/ar/1

[3] Hamori, Monika. "Job Hopping to the Top and other Career Fallacies." Harvard Business Review, July August 2010.

[4] "Why Career Plans are Dangerous." Forbes, 20 July 2012: http://www.forbes.com/sites/actiontrumpseverything/2012/07/20/why-career-plans-are-dangerous/

Christy Roach Hollywood leads Hollywood & Associates, a firm focused on better business development and offering both strategic and operational business development support. She has held pivotal BD roles at KPMG/BearingPoint, RTI International, Noblis (formerly known as Mitretek), PATH, and Fidelity Investments. She spoke on competitive analysis at the APMP 2008 Conference and has been an active APMP member since 2003. She can be reached at christy@hollywoodassoc.com

May Dinner Event Shows that RFI Responses Matter

by Lisa Pafe, PMP, PPM.APMP

"Treat the RFI response as seriously as a proposal." That was the consensus at the APMP NCA's May Dinner event on "Effective RFI Responses". Three panelists, Lenise Lago, Deputy Chief for Business Operations of the U.S. Forest Service; Patrick Breen, Acquisition Group Manager for the Civilian Sector of FEDSIM within the Office of Assisted Acquisition Services in General Service Administration (GSA) Federal Acquisition Service; and Board President Olessia Smotrova-Taylor, AF.APMP, President/CEO of OST Global Solutions, Inc., shared their insights with a packed audience at the Westin Tysons Corner.

Panelists Olessia Smotrova-Taylor, Patrick Breen, Lenise Lago and Moderator Jeremy Arensdorf respond to audience questions.

Lenise pointed out that RFI responses provide an opportunity for government to interact and learn from leading and experienced private sector companies, yet for a recent Forest Service RFI, only 20% of the responses were worthwhile reading for the program team because the remainder were generic. She stated that the Forest Service does use RFI responses for down-select purposes, and does change RFP requirements based on what they learn from RFI responses submitted.

Patrick also stressed that the RFI responses must be tailored or they will end up in the "circular file." He recommended expending effort to understand the purpose of the RFI and ensuring the content specifically addresses the required content and format. Just as with an RFP response, tailoring to customer needs is critical or the requesting agency will disregard the submission. He reminded the audience that the RFI response does not take the place of face-to-face meetings and due diligence.

Olessia highlighted how implementing a tailored win strategy results in an effective RFI response that makes the customer eagerly await the proposal. She stressed avoiding common mistakes such as lecturing, cutting and pasting boilerplate, and overloading the response with irrelevant information. Instead, she recommended treating the RFI response like a proposal response: annotate the outline, brainstorm, provide thoughtful responses, explain why your recommendation is in the best interests of the government customer, and allocate appropriate B&P funds to position yourself to win the pursuit.

The event included audience interaction and a very lively Q&A session, expertly moderated by Jeremy Arensdorf, Vice President at Jefferson Consulting Group, followed by sponsor raffles. The Speaker Series Planning Committee would like to thank our speakers, moderator, and sponsors Enexdi, Lohfeld Consulting Group, Red Team Consulting, Richter & Company, Rofori, and 24 Hour Company who helped make this event a success. We look forward to seeing you at the July 17 dinner event on How to Find and Manage Teaming Partners.

Lisa Pafe, PPM.APMP, PMP, is Principal Consultant at Lohfeld Consulting Group, Inc. With more than 20 years of experience in business capture, process improvement, project and proposal management, and proposal operations, Lisa is an APM.APMP and a PMI-certified PMP as well as a trained ISO 9001:2008 Internal Auditor. She currently serves on the APMP NCA Board of Directors as Chair of the Speaker 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

What Can Proposal Professionals Do in a Time of Market Stress? The Market Picture...

by Russell Smith

During the eight months since October, we have seen the most abnormal market for proposal services in living memory. The paradigm of higher budgets every year is now a thing of the past. Instead, we are looking at nine more lean years as the debt is paid down. Should the politicians reach a "grand bargain", the budgets for the "discretionary spending" that generates RFPs will likely be lower rather than higher each succeeding year.

The Effect on Proposal Professionals

The contracting market will put pressure on proposal professionals, both employees and consultants. As federal contractors have to do more with less, they will need to continue reducing the force of proposal employees and reducing the budget for proposal consultants. Given that the federal market is more competitive now, the contractors will want to invest more in proposal resources. However, market realities will force most of them to invest less precious resources in proposal personnel.

What Can Proposal Professionals Do?

Most proposal people have one strong character trait that will help them get through this crisis – they are" agile" people who are used to doing many different things as needed to get the proposal out the door. The job requires us to be resourceful, and most of us have learned how to be survivors.

Now is the time for all of us to focus on developing our best strategy for not only surviving but also thriving in spite of the contracting market. Following below are some ideas that may be helpful:

1. **Improve your skills.** This involves assessing what added skills you need to provide the highest value service and then learning those skills. This can be done through mentoring, seminars, self help, online study, college classes, MOOC (Massive Open Online Classes), etc.
2. **Improve your credentials.** In this era, employers more and more like to see credentials. Get whatever technical, managerial, and educational credentials you need to maintain your position or move up. Based on 27 years at a proposal services agency, I think the credential offering the greatest value for the effort is the MBA. Getting proposal management certification is quicker.
3. **Flex your style of work to help increase your value.** Especially on this market, welcome added duties and responsibilities. Be the first one to arrive and the last one to leave in the crunch times. And bring your best group work personality to the task.
4. **Consider a career change if you think this would be in your best interest.** For example, a system engineer helping with product proposals can probably find a system development position in an expanding market area. A graphic artist has skills that are readily transportable in many different directions. And a proposal writer is qualified to do other types of

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technical, marketing, and business writing. This option is especially considerable based on circumstances – for example, if you have family responsibilities that prevent you from working proposal hours.

The most surprising part of this market change is that the sky has not fallen. As the fiscal cliff drama began to unfold, it appeared to me that we were about to experience a calamity like a typhoon or an earthquake. Instead, this is a crisis that those of us who love the business can get through. Times may not be as easy and fast as they were during past decades. But we are agile people. We will learn to adapt. And we will be able to run even faster in this never ending race that brings so much fun and excitement to our lives.

Russell Smith's life centers on helping companies prepare winning proposals. He has served as president of Organizational Communications, Inc (OCI) for 27 years. The Company provides best-in-industry proposal consultant services to government contractors. The largest talent bench in the industry helps OCI quickly provide responsive service. The Company helps customers (1) fill gaps in their proposal teams; (2) prepare whole proposals for contracts from $10 M to $50 B; and (3) receive proposal training. Russell holds a BA and MA degree from the University of Texas and a Doctorate from the College of William and Mary. Being able to work in the proposal consulting business is so exciting that I will probably never be able to retire. Our Company web site can be seen at: http://www.ociwins.com. Anyone with questions is invited to contact Russell at 703-689-9600.

How I Fell Into Proposals – and What I Hope to Leave for the Next Person Who Does

by Chris Johnston

I became a proposal professional the same way most of us did – I fell into it.

When I graduated from Saint Joseph's University in 1986, I was armed with a well-rounded Jesuit liberal arts education, but not much direction as I entered the job market. That was not the college's fault; it was entirely mine for floating through my four years and not taking advantage of the many opportunities that existed to prepare myself for life in the "real world." My college GPA was hardly impressive, yet I knew how to write better than most of my peers. As I left the cocoon of the campus, I did what I had often done in college, drawing upon on my writing skills as a means to solve the two big problems I now faced – finding a job and building a career.

It was not long before I found a job in Philadelphia as an analyst for a workers' compensation insurance rating bureau. Here I was basically both an analyst and technical writer – I would review business operations from companies all over Pennsylvania, determine their appropriate rating classifications, and then issue letters, which followed a very standard format, to these companies and their insurers with my findings. It was not particularly exciting work, but it was a job and I was reasonably good at it.

Little did I know at the time, I was learning how to fit facts, data and analysis into a compliant outline!

I quickly outgrew that first job. Knowing there was so much more I could do, and inspired by the desire to solve "big" problems, I plotted my return to academia. Fortunately I had been attending evening MBA classes at St. Joe's, and unlike during my undergraduate years, earning excellent grades. These transcripts helped establish my worth for a spot in Indiana University's prestigious MPA program at the School of Public and Environmental Affairs in Bloomington. For two years I studied harder and slept less than I ever had. I excelled in the classroom, but nowhere more so than in a course called Environmental Policy Analysis, where each week students had to break down a complex issue and then propose a solution – in two pages. My writing skills propelled me to an A+ in that class from a professor who rarely gave A's to anyone.

Little did I know at the time, I was writing a new executive summary every week!

Upon graduation in 1992, I returned to the east coast ready to either become an environmental lobbyist, or work on Capitol Hill helping to craft environmental legislation. After a lengthy search in a down economy, I eventually obtained a short-term position with an environmental organization in D.C., and was on finally my way, that is, until the position ended and again nobody was hiring. Desperate to pay my rent and

> As proposal managers, we solve all kinds of problems every day – content problems, resource problems, schedule problems, to name just a few. Simply put, we are problem solvers.

keep my belly full, I fell back on my writing and editing skills, ostensibly as a "temporary" measure; once opportunities in my chosen field picked up, I figured I would move back into a role there.

Little did I know at the time, I had just stumbled into my new career path!

I quickly learned that contractors in the D.C. metro area desperately needed people who could write and translate complex, jargon-filled gobbledygook from SMEs into something a government evaluator could actually read and understand. The more proposals I supported, the more I learned about the entire proposal development process – not just the writing, but the planning and the production. I soon added layout and production to my own skill set, and in one contract position found myself running the entire production shop for the company's proposals, training manuals, consulting reports and similar documents.

Little did I know at the time, I was rounding out my proposal manager skill set!

In 1997, I decided I was tired of temporary consulting work and wanted the security of a full-time position, so I joined a company called Autometric (later acquired by Boeing) as a technical writer. You can probably guess what happened next; I immediately started supporting proposals and caught the attention of the top company proposal manager, who started asking me to support all of his proposals. A year later, I was managing my own proposals, and I have done so since. Along the way, as I have moved to different employers and grown, I have expanded into training the full range of business development best practices, building and implementing automated proposal and capture systems, and performing BD and capture work across the BD lifecycle. So that is how I have gotten to where I am today.

It is fair to say that I initially rode a wave into the world of proposal development. But as my career has progressed, questions that confront early careerists, such as those related to getting established and climbing the ladder, have given way to more mature inquiries, such as where do I as a mid-career proposal professional, want to go now? It is an existential question of sorts, because it seeks to ascertain not only why I am here now, but also what I want to leave behind for others when I go. I think back to those earlier years, when I saw myself solving big problems.

As proposal managers, we solve all kinds of problems every day – content problems, resource problems, schedule problems, to name just a few. Simply put, we are problem solvers. However, the "big problem" we face, in my opinion, is creating an environment where everyone can be a problem solver. Proposals need not be dark and mysterious beasts that only the proposal wizards can tame. Proposals are hard work but they do not require Harry Potter. Proposals are projects, and anyone who can support a project can support a proposal. The difference from more conventional types of projects lies in the proper application of our own discipline's best practices and related tools. We have to inculcate

proposal competency throughout the organizations where we work. We do this through leading by example, and also through training and mentoring. The more we do these things, the more we "demythologize" proposals, remove the fear factor and help our organizations succeed.

That is why, as I move ahead in my proposal career, I will look to emphasize spreading proposal development competency. It is not just about being a player, but about being a player-coach, someone who performs and leads by example, and also teaches and inspires others to greatness. I will look to apply my knowledge to build and expand proposal and capture competency across the organizations where I work, to make excellence in proposals the norm, and take proposal development out of the world of black magic. What I love about this line of work is the opportunity to continually learn, and then pass that knowledge on to others to make them stronger. Doing so not only pays it forward, it also empowers the team and the entire organization.

I know at some point, I will move on from the world of proposals, perhaps to my dream second career of becoming a running coach (I am currently pursuing my certification from USA Track & Field). But when I do finally call it a career, I hope to have a left behind a legacy that long outlasts any memory of my name in the places where I have worked.

Chris Johnston has nearly 20 years experience in proposals and business development, and over 16 years of direct proposal management experience. He recently joined Dynamics Research Corporation (www.drc.com) as a proposal manager supporting DRC proposal and capture teams in the company's Arlington and Reston, Virginia offices. Previously, Chris was Proposal Manager at UNCF Special Programs Corporation (UNCFSP), a 501(c)3 nonprofit corporation that seeks to connect minority institutions of higher education and students with opportunities in the Federal Government. Chris achieved APMP Foundation Level certification in April of 2011. He holds a Master's Degree in Public Affairs from Indiana University (1992) and a Bachelor of Arts Degree in Political Science from Saint Joseph's University (1986). Chris has been a member of APMP-NCA since 1999, and has served on the committee that organizes the APMP-NCA annual Proposal Basics Boot Camp since its inception in 2008. Away from the office, he enjoys spending time with his wife and best friend, Lynn, training for and running marathons, and passionately following his favorite baseball team, the Philadelphia Phillies.

APMP-NCA Members!

When was the last time that you logged into apmp.org and updated your profile information? It is easy to do and only takes a few minutes. Log in, and under "My Profile" go to Manage Profile and click on Edit Bio. Update your information and click on the blue "save changes" button at the bottom. It is that easy. Having your correct contact information makes it easier for the NCA Chapter to keep you informed on upcoming events and activities.

"Proposal Professionals: How Did We Get Here? Where Are We Going? How Do We Get There?"

by Lisa McQuail, PPC

From the tender age of six, I knew I would be an archeologist. Who dreams about being a Proposal Management Professional? I sure didn't! I spent many summers as a child exploring the ancient Native American campsites on my great-grandfather Sims's farm in the Tennessee hills (along with turning over rocks in Baptist Branch looking for snakes, and waiting near entrances of crawdad holes for their inhabitants to emerge). In addition to learning about the original human inhabitants of Middle Tennessee, I also found proof that millions of years ago in that land-locked region there had once been a vast sea—fossilized remains of the denizens of its briny and tepid depths were hollowed out in outcroppings, and every time someone dug a grave in the McLane cemetery, where many of my ancestors are laid to rest, they came up with little stone bead-like disks called "crinoids"—the fossilized remains of Paleozoic undersea lotuses. From this intense interest I developed a habit, and then a self-study, of archeology and geology.

Despite this obsession with science and archeology, wherever I went—in my family, at school, traveling in the library or traveling for real—I was always seemed to be surrounded by writers and artists and musicians who inspired me. They always pulled me back a bit from pure science into a lyricism and aesthetic sense that I carry in my heart, even when writing and story-boarding a proposal in response to a DoD RFP.

Writing poetry is a passion that began early through exposure to religious texts and other Shakespearean-era works. I won a Reader's Digest poetry prize for youth in junior high school, which officially branded me as a good writer at age 12. I went to J.E.B. Stuart High School with actress Julianne Moore and Hollywood Producer Directors Bruce Cohen (Milk, American Beauty) and Tommy Shadyac (Ace Ventura, Nutty Professor, Evan Almighty), so I was with a group of very creative folks from a young age.

My parents collected art wherever they lived, so the walls of our home were filled with Japanese Prints and German Impressionist paintings. Living with those great works of art gave me an appreciation for all artists, including the many graphic designers and webmasters I have worked with throughout the years and my many artist friends whose works now grace the walls of my own home.

When I was a high school student of 17, my mother took pity on me and indulged my obsessions by sending me to Catholic University's Summer Field School in Front Royal Virginia, where we assisted Dr. Robert Gardiner's arrogant Grad Students in their work excavating the remains of a PaleoIndian hunting camp. I learned from these graduate students that I had to study anthropology in order to be an archeologist in the U.S. That summer I met the Great American Novelist

So how in the world did I ever make the gigantic leap from being a practicing archeologist for 20 years to being an APMP certified Proposal Manager Professional?

Robert Girardi. He was 15. I was 17. He taught me to lay in a field, look up at the stars, and dream, and then write it all down. There was no TV, no radio, and in unrelenting blazing heat we retold the plots of our favorite classic American movies. It was the hottest summer anyone could remember—115 degrees on the National Bank of Front Royal electric sign.

Back at home my best friend Laura's father, Howard LaFay, was an editor at the National Geographic. I worshipped at his feet. He was a great man and a great writer. As a young man, he had been a writer for HiFi Magazine, and whenever he was writing on a deadline the LaFay's large Lake Barcroft home was filled with music. His study was his lair—literally—he had tons of exotic animal skins around—their flattened boneless limbs spayed out on the wooden floors surrounding his desk. Just venturing into his office as he was writing was such a privilege for me. He was a mentor to me in archeology, as well as writing and life in general. His oeuvre is proof that even writing about science can be stylish, compelling, and well-illustrated. He was inspired by the places he visited on writing assignments, and after a long stay in Italy he ordered an ice-blue Maserati which was delivered to our neighborhood a few months later. Take a look at his seminal NG article and book on the Vikings and his article on the ancient archive of about 20,000 cuneiform tablets found in Syria dated from around 2250 BC, clay tablet libraries of ancient Ebla in what is now Syria.

So how in the world did I ever make the gigantic leap from being a practicing archeologist for 20 years to being an APMP certified Proposal Manager Professional? Well, Anthropology, as it happens, is just as much, if not more, of a fact-based and research, reading, and writing-based course of study as journalism or proposal writing. At George Mason University I founded the University's Anthropology Club, where I invited legendary British anthropologist Colin Turnbull, author of best-selling books such as The Forest People and The Mountain People, to speak to us.

Writing in those days involved an ancient instrument known as the typewriter. If I was lucky, I could get time on the Anthropology Club room IBM Selectric, or hang out at my parents; house where my Mom, who had typed the Constitution of Japan (yet another story) kept her prized IBM Selectric. Most of the time, however, it was me, a pot of tea, a pack of cigarettes, and my little electric Smith-Corona. Every college student must crank out a series of well-researched term papers, even today, but cutting and pasting was just that in those days—cutting with scissors and pasting with library paste or the pleasantly mind-altering rubber cement.

I employed gallons of rubber cement cutting and pasting during the year I was a Cooperative Education intern with Dr. Paul Michael Taylor in 1983 at the Smithsonian Institution's National Museum of Natural History. Working there, one of my projects was to assist him in writing the Tobelo–English dictionary (Tobelo is a Melanesian language spoken on the Eastern Indonesian island of Halmahera, where Dr. Taylor had undertaken his research while at Yale). I had to first photocopy unabridged dictionaries in the three languages and then proceed to cut out cross-definitions from the Dutch-Tobelo and the Dutch-English dictionaries and paste each entry onto 5x7 cards. I often think of this project when I have an impossibly mundane task in front of me, which will eventually lead to the payoff of a Promised Land of original scholarship, or at least lucrative contract work for my employers. I was exposed to the debilitating condition of "writer's block" for the first time when Dr. Taylor undertook other more narrative books. I learned a lot from him, and how to get around that, by watching him overcome his blocks in various ways.

I left the super-cool world of the Smithsonian and Dr. Taylor's inner sanctum of research anthropology for a PhD Anthropology Program at what I like to call the "forgotten Ivy

League School" – the University of Pennsylvania. To get a hint of what that was like, imagine walking though the University of Pennsylvania's University Museum's forests of totem poles and phalanxes of monumental Egyptian statues on the way to class every day. In 1986 I did my fieldwork in Central Thailand at a Bronze Age copper smelting site with the Thailand Archaeometallurgy Program, sponsored by the National Geographic Society.

Eventually, I married and had a daughter, whom I taught to speak my mother tongue of English. I have had two other children and I found that teaching children to express themselves in English is quite stimulating, and that writing is really easy to do with small children when they are still in their napping stages (as long as one is adept at ignoring laundry and sinks full of dishes). I returned to the Smithsonian and to Dr. Taylor's world in 1989. I was a Visiting Scientist in the Asia Culture History Program, and since by that time I was an expert in all things Thai, I was assigned to research the collections from Thailand.

Her Majesty, Queen Sirikit of Thailand, found out about my work in the collections and arranged for funding for my research, and eventually IBM and the Smithsonian itself also pitched in.

On September 11, 2001, I made a vow to do all that I could to fight terrorism, in any way I could. Soon, based on my anthropological expertise, I joined a crew writing and producing 14 films on the culture and history of Afghanistan and Iraq. For more than 10 years I devoted myself to DoD and other work in Afghanistan, working with Afghan-American-owned companies, the Embassy of Afghanistan, and the Afghan-American Chamber of Commerce, working side-by-side with many fine colleagues, both Afghan and American, to do our part to defeat terrorism in Afghanistan. In the process, I became a sought-after proposal writer and manager with a win rate of more than $20 Million per month. After years with very little guidance except FAR and the RFPs themselves, I discovered APMP, the Shipley Method, and all of the Best Practices that go into being a proposal management professional.

> That is truly the new battle we are all fighting now – the work of rebuilding our nation's economy on the Home Front through the work that we win for our companies.

I am now plying my trade as Proposal Manager at PPC, under the expert leadership of Keith Cromack, Vice President for Communications and Business Development. I am privileged to work in this IT and Management Company, surrounded by pioneers in Knowledge Management, Cloud Computing and Climate Change. Many days, I wake up and feel that this must be what it was like to work at Bell Labs! I am learning more and more about true collaboration in writing from the SMEs and VPs here at PPC.

I have also learned so much about creativity and the fun-factor from artists and writers and actors. I have learned about creating the right mental and physical environment for writing from Great Ones like Howard LaFay and his lair and music. I hope I will be able to inspire others to reach for the stars and write about it as my old friend, novelist Robert Girardi, taught me to do so long ago!

As far as being a Proposal Management Professional, I never knew that this was where I was actually going, and never dreamed that I would end up outside of academia in the business world, but I am thrilled to have the opportunity to play an instrumental part in growing as fine a company as PPC. That is truly the new battle we are all fighting now – the work of rebuilding our nation's economy on the Home Front through the work that we win for our companies.

Lisa McQuail is a Proposal Management Professional accredited at the Foundation Level by the Association of Proposal Management Professionals (APMP). She is a Shipley and APMP trained Director of Business Development, Proposal Manager/senior proposal writer/editor with more than 10 years of experience in Federal contract and grant proposal responses with specialties in DoD security and construction (U.S. Army Corps of Engineers, U.S. Navy, U.S. Air Force), USAID & State Department security development, and healthcare writing, including HHS/CMS Affordable Care Act implementation, NIH and CDC projects, and software and IT writing, including MicroTech and Technologists, Inc. Her publications include Treasures of Two Nations: Thai Royal Gifts to the United States of America (Smithsonian, 1997), His Majesty King Bhumibol Adulyadej Visits the United States: A Souvenir Album (Office of the Thai Prime Minister, 1996) and First Peoples: Maasai (Lerner Press, 2000). All can be seen at www.Amazon.com under her name. Ms. McQuail has been chosen to be one of the workshop leaders in the APMP National Capital Area Boot Camp this Fall on the subject of storyboarding.

APMP-NCA is Announcing...

Scholarship Opportunities for the APMP International Bids and Proposal Conference in Chicago May 26–29, 2014

The purpose of the APMP-NCA Scholarship Awards is to provide two 2014 APMP International Bids and Proposal Conference scholarship awards to junior professionals who have shown an interest in their Proposal Professional Career development to include Proposal Management, Pricing Management, Graphic Design, Business Development, and/or Capture Management areas. Two Scholarship Awards have been established to honor individuals who demonstrated a commitment to Proposal Professional Development.

Applications must be submitted by September 30, 2013 and can be found on the NCA web site HERE for additional information contact prodev@apmpnca.org.

Winning The War On Data—Knowledge Management in the Business Development Lifecycle, Part 2

by Gillian A. Dionne, APM.APMP, Certified Knowledge Manager (CKM)

Part 1 introduced the concept of knowledge management (KM). Part 2 explains how to apply KM concepts to specific activities and processes in the BD and business lifecycle.

The BD Lifecycle and Process Improvement. From opportunity identification through final submission, significant information is generated by the capture and proposal teams.

Most successful organizations have an established business development (BD) process for acquiring new business. While the specific processes and procedures used by a company may vary based on the market share, customers, and capabilities, the basic premise of BD remains the same: "the tasks and processes concerning analytical preparation of potential growth opportunities, the support and monitoring of the implementation of growth opportunities…"[1]

[1] Sørensen, Hans Eibe (2012). Business Development: a market-oriented perspective. John Wiley & Sons.

The Capability Maturity Model ® for Business Development (BD-CMM)[2][3] is a baseline for mapping the relative maturity of an organization's BD processes to industry-defined best practices. As the BD-CMM illustrates in figure 1, an organization's ability to develop, implement, follow, and improve processes is a key performance indicator for the maturity and integration of BD within the enterprise. While all five steps embrace the maturity of an organization, the Capabilities Key Process Area (KPA) specifically addresses enhancing the systems that support BD operations that would be directly relevant to KM, including a specific capability of establishing and maintaining suitable infrastructure across the business acquisition life cycle in Level 3 and in Level 4, requires integrated processes and systems across all enterprise operations. Level 5 expects a

[2] Business Development Institute International (http://www.bd-institute.org/)

[3] Capability Maturity Model and CMM are registered in the U.S. Patent and Trademark Office by Carnegie Mellon University

Business Development Capability Maturity Model® (BD-CMM)

Key Process Categories	Customer	Focus	People	Capabilities
Themes	Increasing Customer Value	Improving Performance and Synergy	Building Competencies and Teams	Enhancing Systems and Processes
Levels	Key Process Areas (KPAs)			
5 Optimizing	• Innovation and Transformation			
4 Managed	• Relationship Management	• Enterprise Influence • Quantitative Process Management	• High-Performance Teams	• Business Development System Integration • Infrastructure Management
3 Defined	• Solution Development	• Organizational Tactics • Quality Management	• Organizational Competencies Development	• Business Development Processes • Work Environment
2 Repeatable	• Response Generation	• Business Development Administration • Quality Control	• Individual Skills Development	• Sales/Capture Procedures • Work Environment
1 Initial	• Ad hoc			

Capability Maturity Model and CMM are registered trademarks of the Carnegie Mellon Software Engineering Institute

Figure 1. BD Institute's Framework of Maturity Levels. An organization's ability to develop, implement, follow, and improve processes is a key performance indicator for the maturity and integration of BD within the enterprise. (this is Version 1.0 of the BD-CMM; Version 2.0 will be released in late May 2013). Used with permission.

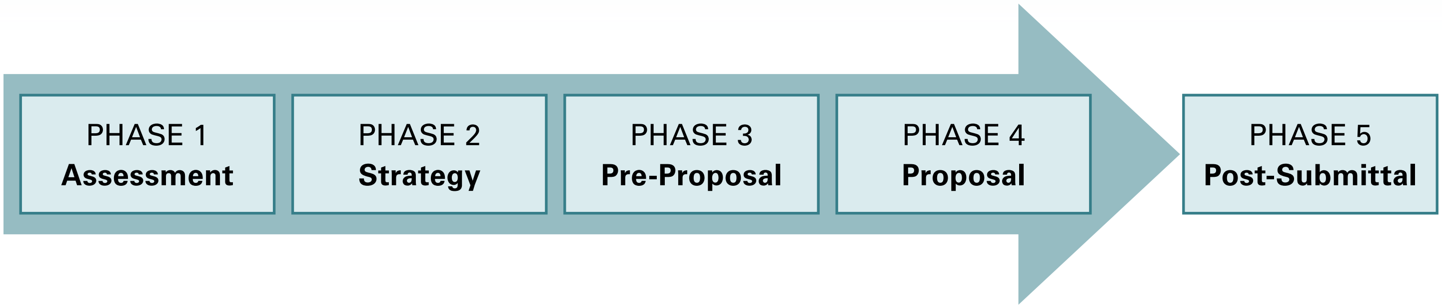

Figure 2. The Typical Business Development Lifecycle Process. From Phase 1 Assessment through Phase 5, Post-Submittal, the typical BD lifecycle creates significant amounts of information that can be parsed into a knowledge management system.

cultural transformation to emphasize ongoing optimization of processes and infrastructure.[1]

The KM approach defined here ties in with the BD-CMM's requirement of enhanced and integrated is to map the enterprise's KM maturity development against the five levels delineated in the BD-CMM because the recognition of knowledge as reusable information and the subsequent transformation into knowledge and wisdom goes hand-in-hand with the increasing sophistication of an organization's BD processes.

The typical BD lifecycle illustrated in figure 2 creates a significant amount of "information items" that are easily parsed into KM tools. From assessment through award (and beyond), typical BD processes and procedures generate significant amounts of structured and unstructured data that are perfect for feeding a KM system. Structured data includes content organized in database fields such as opportunity tracking information such as due date, customer name, and expected award value. Conversely, unstructured data includes documents such as technical proposal volumes that may have a page format and a definable set of content in an organized outline (what proposal professionals would consider structured content) but consists of large amounts of text and graphic elements that are not tagged with metadata.

Once these information items are captured in a KM system, the structured data can be used as metadata to tag unstructured data for searching. Metadata literally means "data about data." So, in a BD KM system, a connection of unstructured and structured data could be to tag multiple documents (unstructured data) associated with one opportunity in the pipeline (structured data). By connecting the highly structured pipeline metadata about an opportunity to the many unstructured documents generated during the BD lifecycle, the unstructured documents are now tagged with information that provides context for reuse. Note that the concept of connecting metadata to unstructured content can and should extend past the BD lifecycle as the enterprise matures as measured against the BD-CMM model.

BD Information Items

Applying KM basics to the BD lifecycle allows us to identify the content milestones in our processes that lend themselves to capture and reuse. A partial list of information items that are generated or captured in the typical BD lifecycle is provided here.

Example Unstructured Content	Example Structured Content
Solicitation documents	RFI/Proposal Due Dates
Call/capture/proposal plans	Expected Award Date
Pursuit/strategy/bid reviews	Expected Award Value
Storyboards	Customer Name/Location
Final proposal documents	Type of Contract
Lessons learned	Contract Vehicle
Annotated outlines	Award Status
Customer hot buttons	Contract Number (once awarded)

The key for effective BD KMS is to look beyond the standard approach of organizing documents in a hierarchical method and instead seek to examine how we do things – the information worker process – in order to apply value and become true knowledge workers.

[1] Business Development Capability Maturity Model for Business Development (Version 1.0), Staged Representation (April 2007), p. 11

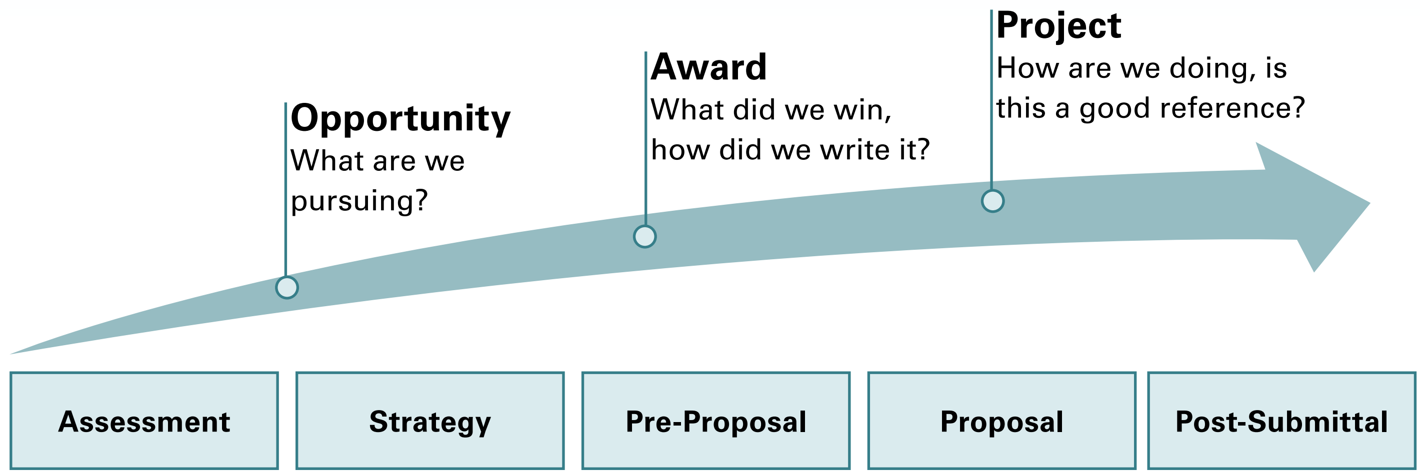

Figure 3. Mapping the BD Lifecycle to the Business Lifecycle. Overlaying the Opportunity, Award, and Project milestones to the BD lifecycle phases allows KMS to clearly identify knowledge relevant to winning new business.

Turning BD Information into Knowledge

Information Age solutions created electronic filing cabinets full of documents (proposals, RFPs, past performance citations) organized in a hierarchy (by year, by customer, by owning organization, by solicitation number). When information was located, it was not in context – a proposal document had to be cross-referenced against a separate system to determine if it was a winning proposal, and then yet at least one other system (or multiple systems) to find information on the current status (i.e., who is the Program Manager, what is the period of performance, what does the customer think of us). Information systems make you do all the analysis and correlation manually. If you have search capabilities, it is a simple keyword search that brings back tremendous numbers of hits and does little to assist you in quickly locating the right piece of information out of the thousands of hits you may get.

Effective KMS maps the BD lifecycle phases to the three major business lifecycle milestones (Pursuit, Award, and Project) to enable users to quickly filter knowledge by relevance to the activities being performed. Figure 3 maps the BD lifecycle to the business lifecycle.

Lifecycle Information Items

The information artifacts generated during the BD lifecycle can be identified and categorized for reuse in a KMS. Figure 4 shows potential information artifact sources that could be used in the Opportunity phase, including relevant past performance, overall corporate capabilities, business intelligence about the potential competition, details on our customer relationship, and names of internal subject matter experts who could serve on black hat reviews.

Figure 4. Tying the Information Artifacts Together—BD and KM. For the Opportunity phase, several potential information artifacts are listed. These items can be captured and used to provide knowledge to assist active and future opportunities.

Once a KMS system is established, each time an information artifact is generated, it has the potential to be reused rather than re-generated, which ties in with the BD-CMM maturity development of an organization.

Figure 4. Tying the Information Artifacts Together—BD and KM. For the Opportunity phase, several potential information artifacts are listed. These items can be captured and used to provide knowledge to assist active and future opportunities.

Tying it All Together—Moving toward a KMS

The first step in moving toward a knowledge-centric process is to analyze the existing process and determine where the gaps allow information to get lost.

As discussed in *Winning the War on Data – Knowledge Management in the Business Development Lifecycle, Part 1*, the five KM core components (people, processes, technology, structure, and culture) are all important considerations in determining an optimal approach for launching KM initiatives in the enterprise. A keen understanding of your organization tools function is a must before you sign on the dotted line and commit a large chunk of time and money, as well as put your reputation on the line to deliver a functional system that end users embrace. No system is going to transform your BD process overnight into a Level 5 BD-CMM operation. Significant time, money, and senior management buy in is required to effect the change that is necessary to successfully deploy a KMS—whether homegrown or commercially procured. Watching canned demonstrations and even evaluating customized proof of concept proposals is not enough to validate that the system is right for your enterprise, no matter what a vendor may promise.

There are several turnkey KM systems in the proposal/business development marketplace—many of these

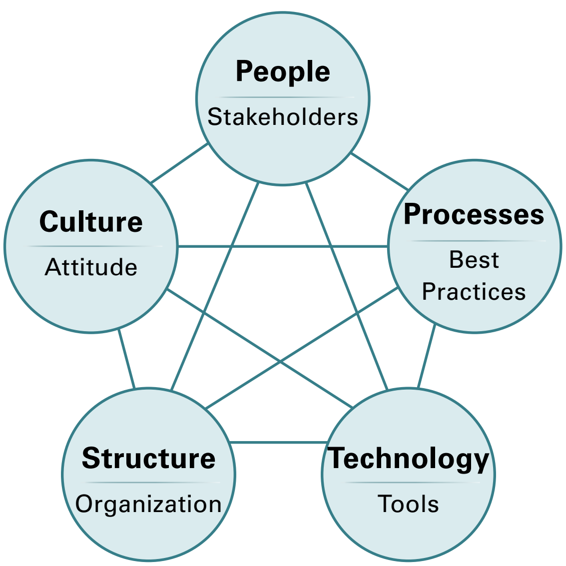

Figure 5. KM Core Components. A successful KMS will integrate these five components into a defined process for business development that is embraced, used, and maintained by the stakeholders.

companies exhibit their products at local and national proposal events. Some of these commercial systems require a wholesale replacement of your existing IT infrastructure and your BD process with a customized, vendor-driven process and toolset. Such turnkey systems are best deployed in a relatively small and centralized organization with the cultural mindset that will readily accept such a fundamental change and that has the financial, management, and employee commitment to support a complete overhaul of systems, processes, and procedures.

For the rest of us who live in complex, matrixed organizations with well-established legacy environments, the best starting point is a gap analysis to identify areas that can be improved. The gap analysis should look at BD processes and tools and determine how to apply BD-CMM and KM best practices to the existing capabilities to slowly move the organization from information management to knowledge management.

To get started with knowledge management, every organization must embrace change. Traditional processes generate information in traditional ways, and store it in traditional ways. KM requires a significant amount of commitment to change.

Gillian Dionne is Director of BD Information Systems and Proposals at General Dynamics Information Technology (GDIT) in Fairfax, VA. She has led the deployment of multiple KMS to support business development activities. Gillian is accredited by APMP at Practitioner level and is working on her Professional level certification. Gillian also holds the Certified Knowledge Manager (CKM) certification.

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Leverage Yourself!

by Tony Shifflett

Backing Into Proposals

Most proposal professionals come from diverse educational backgrounds and professional experiences. I got into doing proposals back in the dot com era as a newly minted MBA. I was in IT sales, slamming bodies onto IT projects. As it worked out, I quickly discovered that you could make more money writing your own proposals than putting consultants onto other people's projects. We seemed to be getting nowhere as a sales organization, and, in fact, were backsliding in terms of numbers deployed. We had a "strategic" plan – but the plan was at best tactical in terms of business growth. We were waiting for others to develop business, and then we would approach them with people.

Without any training at all, I started to contact commercial clients and ask what types of projects they had planned for the near future. I started reading ERP and CRM books. My time horizon was a depressingly short three months, but when you body shop for a living, sales pressure keeps you on the phone. A couple of months with no placements, and you will find yourself on the street. Over a year's time, I was able to do two proposals. They worked out to be a total failure, but it was a good learning experience. Unfortunately, it convinced the powers to be at the company that I was at to stick to the body-shopping plan.

My next stop was with a company that actually did proposals, but they merely cut and pasted content from one proposal to the next. One of the owners told me "company IT needs for accounting systems are the same from one company to the next. Just do a search and replace." This approach brought in some business with smaller companies, but they were stuck in the under $500K range. Looking back, I realize that breaking out into larger numbers was impossible given this approach.

These two experiences – and the collapse of the IT market - soured me on the whole Business Development process, but in the back of my mind, I knew that I would have to try again. In professional life, one always needs to leverage the talents and gifts that they have. Proposal work fits me because it leverages the strengths that I have as a person. I encourage everyone to do what they like in life, and to make sure to leverage those skills in their professional life.

Getting Serious…

I got my start doing government proposals via my competitive intelligence activities. I've always

> Draw upon your strengths. Use the talents you have to build a career, recognize where you are weak, and leverage your strengths to mitigate your weaknesses. Work at it.

been a big reader, and the advent of the Internet was a big deal for me personally. There is so much at your fingertips – you just have to be willing to put in the time. Company information is everywhere, so it is easy to find the right kinds of information related to almost any company and business line they have. I started to write business development reports in a large number of formats. You name it; written reports, PowerPoint, Excel spreadsheet analysis.

These activities got me noticed – I leveraged my strengths. As a result, I started to write more and more, until one of the proposal shops in the large organization I worked picked me up. I started out doing past performances, and worked hard to build a skill set. No pain no gain.

Where to go from here and how to get there?

A big question in any professional's life is what to do to advance your career and income. For me personally, the path to future success seems clear. Work on my skill set, and improve my credentials. I would encourage every proposal professional to conduct a "coming to Jesus meeting" with themselves, and determine what works for them best in their professional life. Once you know yourself, you can work your strategy to get to where you want to be.

For me personally, the best way for a proposal professional to do that is to be as active as possible in APMP. I have learned to leverage my strengths – I suck up training and education. I love to write and edit documents, and I understand technologies and am a quick study. Ergo, the thing to do to advance myself to my long-term goal of managing my own shop is to keep at it in terms of improving my skill set while leveraging the talents that I have.

The moral of the story is to look at the gifts and talents that you have. Decide how to leverage them to keep a roof over your head. Once you know who you are, you can then make the moves – getting credentials, etc. – that you need to thrive and grow in the proposal business.

Tony Shifflett came to town to complete his education and get involved in politics. He found he liked computers, writing and graphics better, and so got involved in doing commercial proposals and loved it. Since then he has worked for government contractors large and small, and intends to do so the rest of his working life...

Fun Fact...

Wrigley's promoted their new spearmint-flavored chewing gum in 1915 by mailing 4 sample sticks to each of the 1.5 million names listed in US telephone books.

APMP-NCA & APMP International Upcoming Events

Maximize your Return on Investment!

You can get more from your Association of Proposal Management Professional (APMP) membership by affiliating with the National Capital Area (NCA) Chapter at no additional cost. The Benefits of local NCA affiliation include:

- Discounted members-only registration fees for APMP and NCA events
- Get the latest news and knowledge in APMP publications and knowledgebase
- Networking with colleagues in the industry at chapter events
- Meet and network with thought leaders in our profession, and find out about industry news and best practices in the Executive Summary E-Zine
- Be recognized for your skills and professionalism
- Learn more about becoming an accredited proposal professional and earn continuing education unites by participating in chapter activities

Your membership will give you access to the NCA chapter-specific online Body of Knowledge, which includes the APMP Journal and the APMP Perspective, the NCA Executive Summary eZine and PowerPoint Slides from our most recent Speaker Series. In collaboration with the Business Development Institute International (BD-Institute), APMP created the APMP Body of Knowledge for the business development profession, available only to members. It identifies practices, process elements and tools that are generally recognized as key practices and hallmarks of the business development profession.

We look forward to seeing you at our upcoming events!

- July 17, Speaker Series "How to Find and Manage Teaming Partners"
- October 21 & 22, Mid Atlantic Proposal Conference 2013 at the Sheraton Premier, Tysons Corner

We encourage all current members to support APMP-NCA activities and ask that you invite guests to our activities.

Learn more about the benefits of APMP Membership and affiliating with the NCA Chapter to gain the knowledge and connections for success in the business development and proposal profession.

For more information on APMP NCA membership, contact Jay Carroll, Membership Chair at membership@apmpnca.org.

Note From the E-Zine Chair and Chief Editor, Alexis Dimouro, PPM.APMP

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 ezine@apmpnca.org or at 703-678-5158.

How to Find and Manage Teaming Partners

Strategies, pitfalls, and how to avoid disaster. Learn from industry professionals in our new, interactive talk show format with audience participation!

REGISTER NOW!

Location: Westin Tysons

Date: July 17, 2013 - 5:30 to 8:30pm

Government proposals are becoming more and more competitive. The need to develop a quantitative process for selecting and managing teaming partners is more important than ever. It is not just who - we need to understand the why and the when to team or not to team. Risk Management and research is key in making these decisions. Learn from industry professionals that have successfully navigated and created a process that works for their respective sized industries. We will have three speakers from Large, Medium, and Small Businesses who will discuss the challenges in finding and managing teaming partners.

Understanding the strategy that goes into choosing the correct teammates can be the difference between technically acceptable with a cost that works, to technically superior and the lowest cost to win. How do you attach risk to your teaming strategy? When do you consider a teammate? What is the long-term relationship with this teammate? (if any?) All questions that you have to consider and answer prior to making the choice.

Your panel for the evening:

Bill Szymanski, Vice President Federal Civilian & Health IT Solutions, URS. Mr. Szymanski is the VP and P&L and growth leader for agencies including DHS, DoS, SEC, FTC, CMS, VA, and DoD Healthcare . Bill is an experienced executive with both operations experience and a focus on new business operations and business growth. He has 29 years Federal and State IT services experience across a diverse set of Federal Civil agencies. Mr. Szymanski was previously Vice President of Capture Management for Computer Sciences Corporation's (CSC) Civil Group. His previous positions at CSC included DVP and New Business Director for Transportation Solutions Division, Account Executive for the Department of Education, and software development leader for several major federal bids and programs, with a specialty in geospatial data and GIS. He began his career as a programmer/analyst, IV&V analyst, and task leader for several smaller IT services companies. Bill has performed and/or led nearly all roles in the new business, capture, proposal, and delivery lifecycle. He holds an undergraduate degree in Environmental Science from the Virginia Tech

Esther Burgess, PMP, VP, GWACs & IDIQs Center, INDUS Corporation. Ms. Burgess is the Vice President of the GWACs/IDIQs Center for INDUS. She brings over 25 years of proven experience providing both DoD and Civilian Government customers with comprehensive, mission-critical Information Technology (IT) solutions.

Over the past 15 years, she has focused on leveraging GWAC and IDIQ programs to help fuel growth for companies within the Federal IT market. Her extensive knowledge and understanding of the federal acquisition process, and her skills in business development, capture management, proposal and orals presentations, as well as her strong technical background make her a key member of the INDUS team. Ms. Burgess is experienced in both corporate development and program operations. Additionally, her background in working with large, mid-size and small businesses gives her a uniquely valuable perspective and understanding of the challenges and growth factors associated with each. Ms. Burgess brings valuable insights and capabilities to help capture new business and to work with INDUS' partners. Ms. Burgess holds a Master's Degree in Systems Management for R&D Programs from the University of Southern California. She possesses over 25 years of experience in Federal Information Technology environment, and is a co-author of the Earned Value Management book titled "EVM Demystified", published in 2007.

Greg Fitzgerald, Vice President, Information Technology Coalition, Inc. (ITC). Mr. Fitzgerald is partner and Vice President of Information Technology Coalition where he leads full lifecycle business development activities for the corporation. Since he began at ITC 2 years ago he has successfully moved the company from 100% subcontracting to a mix of 50% prime and 50% subcontract work winning 6 prime contracts including DHS TABSS (including the award of the first 3 task orders under that vehicle). Mr. Fitzgerald has 13 years of business development and program management experience across the Federal Sector and has performed in nearly every business development capacity from business developer to capture manager to proposal manager. Prior to joining ITC, Mr. Fitzgerald served as a Main Thrust Capture Director at CSC where he was responsible for the pursuit of large enterprise contracts (in excess of $500M). While at CSC he led the successful capture of more than $1B in single award contracts and served as a new business director for several business units within the Federal Civilian Division. He holds a MS in Technology Management, undergraduate degrees in business and English, and a CIO Certificate in Federal Executive Competencies from CIO University.

Event Moderator – Alex Brown AM.APMP, Director of Services, OST Global Solutions, Inc. 17 years of experience in the government and commercial markets. Experienced as a Business Developer, Capture Manager, Project Manager, and Recruiter. Managed teams of 50 plus, keeping them focused on the project and deliverable. APMP-NCA Board of Directors, Annual Events Chairperson. Experience supporting more than 100 federal contractors with multiple agencies, including, HHS, VA, CMS, DOD, ARMY, AIRFORCE, and NAVY. Guest lecturer for APMP NCA Speaker Series, APMP NCA Boot Camp, APMP NCA Annual Conference, APMP SPAC, APMP New York Chapter, AFCEA Washington DC and Frederick Chapters, Women in Technology Young Professionals, NCMA Annual Conference, SMART-PROC Procurement Conference, and GOVCON.

Register for the July 17 Speaker Series event and be entered into a raffle to **win a one-day pass to the APMP-NCA October 21-22 Mid-Atlantic Annual Boot Camp and Conference!**

Must be present at the dinner to win. The lucky winner can attend either day of the event for free and has the opportunity to upgrade to a two-day pass at a discounted rate.

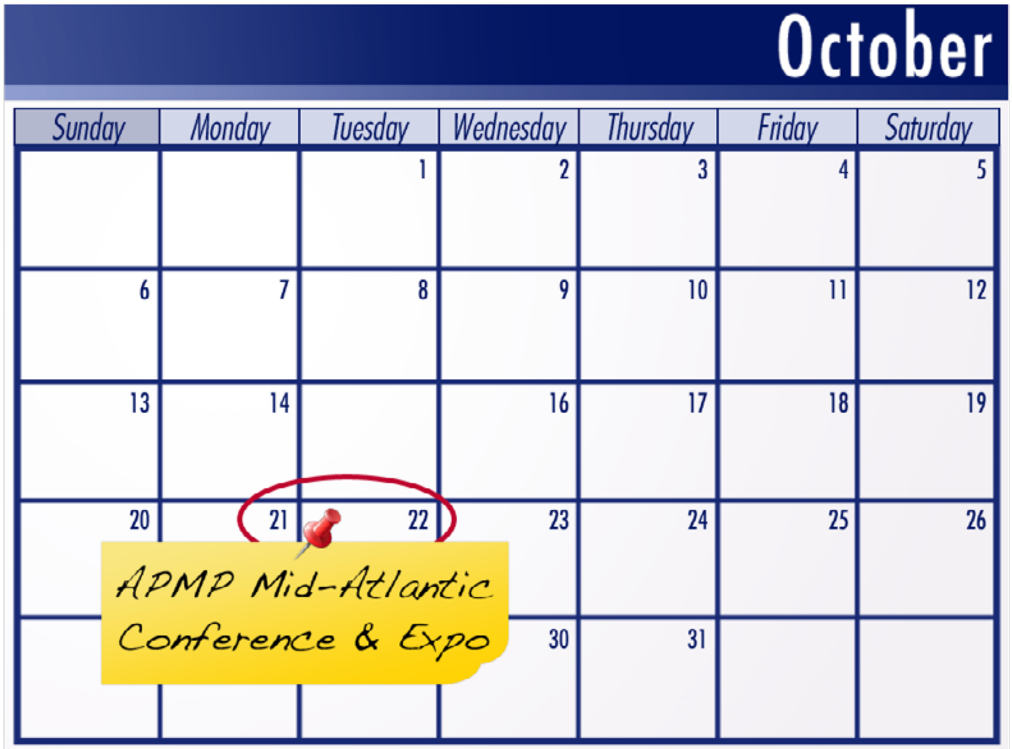
Mid-Atlantic Proposal Boot Camp and Conference

Save the Date!

2013 APMP Mid-Atlantic Conference & Expo

October 21-22

Sheraton Premier in Tysons Corner, VA



We will be giving away a FREE registration to the 2014 Bid and Proposal Con in Chicago!

Stay tuned for more information.

Coming Soon...

Strengthen tomorrow's workforce today! Coming soon to APMP-NCA is a mentoring program designed to allow leading proposal professionals to influence up and coming professionals and provide personal guidance in a dynamic way. Invest in our growing profession by signing up to be a mentor. Interested? Email mentorship@apmpnca.org for more information by July 15th.

Support your APMP-NCA Board – Consider joining a committee as a Member or Chair Person.

We are considering adding additional positions for Professional Development, Mentoring, and Conferences.

Current Executive Board Positions include:

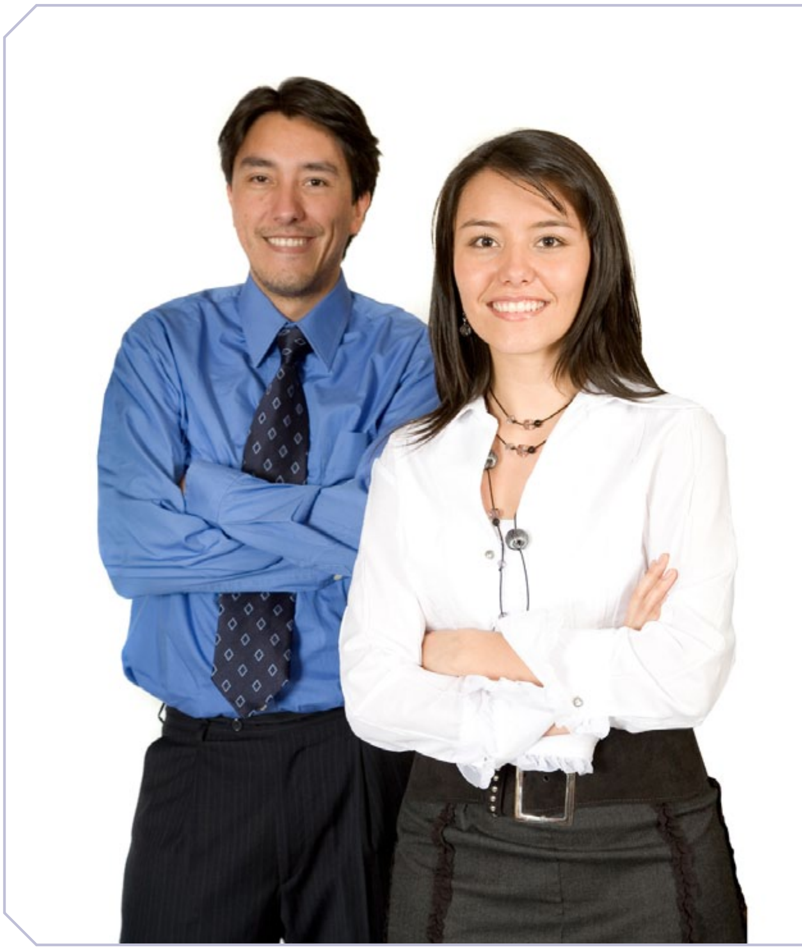
President

Vice President

Treasurer

Secretary

And the Current Directors At Large



Committee's include:

Annual Events Chairperson

Corporate Partner Program Chairperson

Event Logistics Chairperson

Networking Chairperson

Speaker Series Chairperson

eZine Chairperson

Marketing & Publicity Chairperson

Membership Chairperson

Technology Chairperson

Look for updates and election details coming soon on the APMP-NCA website HERE!

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/.

Special thanks to...

Executive Summary Editorial Staff

Executive Summary eZine Chair

Alexis Dimouro, PPM.APMP
Intelligent Decisions, Inc.
ezine@apmpnca.org
703-678-5158

Editors

Constance Dyson, MBA, AM.APMP
constance.dyson@gmail.com

Brittany Palmer
Brittany@bridgeddesign.com
703.568.7735

Layout and Graphics

24 Hour Company
info@24hrco.com
703-533-7209

Sr. Graphic Designers

Megan Skuller, AM.APMP
24 Hour Company
megan.skuller@24hrco.com
703-533-7209

Debi Ratcliffe
24 Hour Company
debi.ratcliffe@24hrco.com
703-533-7209

Circulation

Bridget Skelly
Bridged Design
bridget@bridgeddesign.com
703.788.6792 (office)

Ben Skelly
Bridged Design
ben@bridgeddesign.com
540.630.0088 (cell)

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Full Page	8.5″ x 11″	$500
Half Page	8.5″ x 5.25″	$250
Quarter Page	4.25″ x 5.25″	$150

Rates are for digitally provided actual-sized color or black and white artwork. Minimum resolution is 150 dpi. Minimum .25" of negative space on all sides. Artwork may be provided in .jpg, .ai, .eps, or .pdf format. Send all proposal/business development-related advertisement submissions to Alexis Dimouro, Executive Summary eZine Chair, ezine@apmp.nca.org (artwork only) and Eric Schwarz, Treasurer, Treasurer@apmpnca.org (copy of artwork and payment details or request for a PayPal invoice for online payment).

Payment may be made via check or paypal. Payment and artwork must be received by the advertisement submission deadline for the advertisement to appear in the corresponding issue of the Executive Summary. Late submissions will appear in the following issue.

Please make check out to "APMP-NCA" and send to the following address:
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A Publication of the Association of Proposal Management Professionals National Capital Area Chapter

APMP-NCA 2013 Corporate Partners

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