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NATIONAL CAPITAL AREA

EXECUTIVE summary

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This Issue's Theme: **Time Management – How Do You Enjoy Your Family Vacations And Manage Busy Season?**

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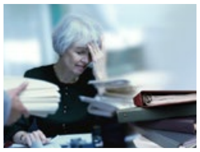


A Publication of the Association of Proposal Management Professionals (APMP) National Capital Area (NCA) Chapter

President's Corner

Agile Time Management

by Maryann Lesnick, CP APMP, PMP, MOS, ACT-IAC Fellow

I am honored and grateful for the opportunity to serve as your Chapter President. However, I quickly discovered that being the NCA Chapter President is like having a second full-time job. So how does one balance time to permit a personal life in between two day jobs??

In my earlier career, I was a software developer and then a Program Manager (PMP-certified). I am well versed in the *"waterfall"* method and the Project Management Body of Knowledge (PMBOK). These traditional models are based on the need for order. Everything is linear – sequential – finish one task before you begin another. That's the way I *"grew up"*.

Since 2001, the landscape of software engineering has shifted focus to a conceptual framework known as Agile. Agile promotes incremental and iterative activities. It employs adaptive planning, evolutionary development and delivery, time-boxed iterations, and rapid and flexible response to change.

As a former software engineer, Agile has piqued my interest. I recently became a certified Scrum Master and have been exploring the applicability of Agile principles to Proposal Management and other areas of my life. I am finding that Agile has relevance to many aspects of my work, professional and personal life – including time management.

Agile uses a technique called time-boxing, which allocates a fixed time period, called a time box, to each planned activity. This approach can also be used to address personal tasks in smaller time frames. It often involves having set objectives and deadlines, which in turn improve productivity.

I have discovered several useful tools that are compatible with Agile principles to help me manage my time and achieve a better work-life balance. I will describe three here.

The Pomodoro Technique

Created in the 1980s by Francesco Cirillo, the Pomodoro Technique is a time management philosophy using alternating periods of maximum focus and down time to complete projects faster and with less mental fatigue.

The Pomodoro Technique website (http://pomodorotechnique.com) describes this simple process:

- Remove all distractions
- Choose a focus task
- Set the timer to 25 minutes
- Work on the task until the timer rings
- Take a 5-minute break
- Every 4 sessions take a longer break, perhaps 15 or 20 minutes

Each 25-minute work period is called a "pomodoro", named after the Italian word for tomato. Francesco Cirillo used a kitchen timer shaped like a tomato as his personal timer, and thus the method's name.

I bought myself a tomato timer like the one in the picture.

According to the official pomodoro website: *"You will probably begin to notice a difference in your work or study process within a day or two. True mastery of the technique takes from seven to twenty days of constant use."* The idea is that frequent breaks keep your mind fresh and focused.

If I have a large and varied to-do list, using the Pomodoro Technique can help me complete projects faster by forcing adherence to strict timing – comparable to an Agile sprint. The constant timing of activities makes me more accountable, and minimizes the time spent procrastinating. I am learning to "respect the tomato", and that helps me handle my workload.

There are digital pomodoro timers available that run on a computer, iPad or cell phone. One that I found for the iPhone is the Pomodoro Focus Booster.

I work from home, so I try to intersperse personal tasks into ever so many pomodoros. And I love the "Coffee Breaks" offered by the 5-minute interludes. Give it a try!

Thinking Outside the Box

Do you find that work tends to bleed into your personal time in your mind? I do. Even though I may be technically *"off the clock"* and put my computer aside for the day, my mind keeps spinning with the problems of the day, or the crisis du jour. How do I let it go?

Actually, these invasive and distracting thoughts may be a good thing on a certain level, as long as I don't let them totally overtake my fun time. When I find myself constantly thinking about a problem, or when I'm stuck or not sure how to approach it, time away from it is often the best way to solve it. I find that I get caught in a tunnel vision. That is, I'm only thinking about it from a limited number of perspectives and can't think of other possible approaches. I can spend long hours thinking about a problem (even outside of normal work hours) without ever solving it.

When that happens, I find it's good to pursue other activities that stimulate my brain to think outside of the box. It may be anything from working in the garden to taking a walk to engaging in a game of scrabble. When I challenge my brain to do other things, I find it frees my mind to solve the problem from a new perspective or in a new way. I can recall days in college when I had a problem to solve, and would get the answer in my sleep. I would immediately get up and write it down. Engaging in other activities helps me approach the problem with fresh eyes and renewed energy. Ultimately, that has led to better results and liberation from "overthinking" the problem during my leisure time.

The Rule of Three

You may be familiar with the Rule of Three, which is often used in speaking, writing, and music, and states that concepts or ideas presented in threes are inherently more interesting, enjoyable, and memorable. Dale Carnegie said that when delivering a message, "Tell them what you going to tell them, tell them, then tell them what you just told them". Steve Jobs was also a well-known disciple of this technique.

They say we cannot survive for more than 3 minutes without air, 3 hours without shelter, 3 days without water, 3 weeks without food. Think of phrases like: truth, justice, and the American way; life, liberty and the pursuit of happiness; The Three Stooges; The Three Little Pigs; Goldilocks and the Three Bears. There is something magical about the number ***3***. All good stories have a beginning, a middle and an end. There is a comfort in the Rule of Three that we can all recognize.

The Rule of Three can be used to make our lives more organized and productive.

J.D. Meier suggests that I write down 3 outcomes I want to achieve during the year. Maybe I want to lose 20 pounds, get an APMP certification, and run a marathon. Then, every Monday write down 3 outcomes I want to achieve that week. This will remind me of the three most important things to do that week. Finally, write down 3 outcomes I want to achieve each day. My weekly and daily outcomes may or may not be directly related to the three goals for the year, but they are important for me at that time.

At the end of the day, week, and year, J.D. Meier then suggests I reflect on how well I did towards accomplishing the goals I set for myself.

Meier's book ***Getting Results the Agile Way*** has these recommendations for implementing the Rule of Three:

1. Start every day by figuring out what to focus on for the day.
2. Test yourself throughout the day – do you remember what your three priorities are?
3. Improve your estimates – pay attention to how long you think things will take, and improve your estimates as time goes on.
4. Feel good about your results! Pat yourself on the back after you achieve what you set off to, for the day, week, and year.

The problem with many productivity and time management systems is they require a lot of overhead, but the Rule of Three does not. Every morning, think about the main three things you have to do, and then you do them. It helps me set my priorities and know what to focus on.

In Closing

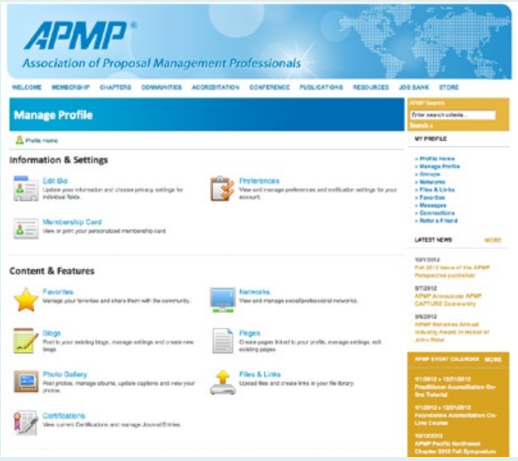
While preparing for this article, I have been working to apply these three principles in my life. I use the Rule of Three to set goals for myself in three areas: work (at CA – my day job), professional (APMP-NCA – my other day job), and personal (free time). I keep a journal at hand and when divine inspiration about one part of my life invades another, I write it down. Finally, I am working to use my pomodoro timer to tackle my day in manageable chunks, with breaks in between. Sometimes I do proposal yoga on my 5-minute breaks!

I find I am drinking more coffee, but am also feeling much more focused and productive. Stay tuned for additional feedback…in the meantime, I invite you to try the pomodoro technique and practice respecting the tomato with me!

President, Maryann Lesnick, CP APMP, PMP, CSM, MOS – A Principal Proposal Manager at CA Technologies, Maryann served as the Vice President of the NCA chapter in 2012-2013, as the 2011 Logistics Chair, on the Boot Camp Committee in 2008-2009, and as Boot Camp Chair in 2010.. Maryann is a Practitioner Level APMP certification mentor, an ACT-IAC Fellow, a Certified Scrum Master, a CMMI Level 2 Internal Assessor, ISO 9000 Internal Auditor, certified Microsoft Office Specialist (MOS), and holds a BS in Mathematics and MS in Information Technology Management.

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.



Ask the Graphics Guru

I Have Less Time and Resources Than Ever To Make Proposals. What Can I Do?

by Mike Parkinson, CPP APMP Fellow

Make your own Proposal Toolbox.

As the saying goes, *"Use the right tool(s) for the job."* It's common sense advice that is often ignored. Imagine building a house without the right tools. More money and time is spent trying to get it right using the wrong tools, and the outcome is inferior.

Your *Proposal Toolbox* should include the following shown in this graphic to the right. (Your goals and challenges will determine the specific solutions you choose.)

1. **Processes**
   Use processes that speed proposal development and ensure consistent, predictable results. Processes can be made, learned and purchased. There are three rules to ensure your processes work: use them, measure them, and improve them (repeat).

2. **Software**
   Most tasks can be streamlined or automated. For a fairly comprehensive list of proposal software tools visit http://www.capterra.com/proposal-management-software.

Tools are available for everything. For example, software can assist you in reviewing proposal language (e.g., http://www.visiblethread.com), RFP analysis (e.g., http://www.xrsolutions.com/products_RFP.html), and graphic development (http://www.getmygraphic.com). Most tools work with Microsoft Office (e.g., http://www.123pas.com) or are integrated into SharePoint (e.g., http://www.lohfeldconsulting.com/service/wincenter-integrated-capture-and-proposal-tool).

I am not championing one software solution over another. You will need to research and test different software to learn what best meets your organization's needs.

I suspect you have had some success integrating components of a *Proposal Toolbox*. My company and clients regularly see exponential improvements when building or buying new tools. Unfortunately, organizations may expect one solution to solve all challenges, which often results in inaction, and no solution is implemented. Do not wait for the ***perfect solution***. It does not exist. Instead, build or buy a solution that solves more than 50% of your challenges. Other processes, tools, or periodic updates can offset a solution's deficiencies. Make or expand your *Proposal Toolbox* today and stop losing time (and money) doing things the hard way with the wrong tools.

Mike Parkinson, PPF.APMP, is an internationally recognized visual communications guru and proposal expert, professional trainer, and award-winning author. He is a partner and head of marketing 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 professionals. Contact Mike at mike@24hrco.com or call 703-533-7209.

APMP NCA Mentorship Program!

The APMP NCA Mentorship program would like to congratulate two protégés who successfully obtained their Foundation level certification at the Bid and Proposal Con in May, Sareesh Rawat and Whitley Carson. Both Sareesh and Whitley wrote letters of gratitude to their mentors, **Kristin Pennypacker** and **Lisa Pafe**.

Whitley Carson – *"Kristin...I am tremendously indebted to your extraordinary mentorship and personal interest in my professional success...You are a superb mentor and have become a dear friend who has taken time to encourage and educate me in the art of Proposal Management. My success thus far has been shaped and guided by your expertise and insight."*

Sareesh Rawat – *"I can't thank Lisa enough for her guidance throughout the program. She took out the time from her extremely busy schedule to help me prepare for the APMP Foundations Certification exam. I have been very lucky to have her as my mentor."*

The program is extremely excited about their certifications and the outcomes so far from the group!

The Mentorship Program also has a few more events planned for the year, including an August 20th Mentorship Meetup, and a formal graduation planned for the 2014 MidAtlantic Conference.

If you are interested in participating in the next class of the Mentorship Program or would like more information about the program, please email mentorship@apmpnca.org.

Capture And Proposal Innovations: Time Management

by Lisa Pafe, CPP APMP, APMP-NCA Vice President

Time. As capture and proposal professionals, we find that it is most certainly NOT on our side. We are always battling time constraints and deadlines that fall at the most inconvenient times, such as vacations or family events. Summer is particularly taxing, especially as we get closer to the end of the Federal fiscal year and the Government pushes out a seemingly endless stream of solicitations.

Advice abounds on how to better manage time. But what time management innovations are most useful for our profession?

People: The biggest time waster related to people is due in large part to distractions caused by innovation. Our teams are so connected to the world through smart phones, tablets, iPads, and the like that they lack focus. It is virtually impossible to hold a meeting without most of the attendees checking their email, social media posts, and text messages.

With all the innovations in personal applications, your team members may even be turning off their oven or spying on their nanny. The problem is not so much a lack of time, but a lack of focus.

> "Starting each day by focusing on winning reminds us of where and how we should be spending our time. It also makes it easier to resist the urge to respond to distractions that might seem important but really aren't. When we manage our distractions instead of letting them manage us, we have a lot more time to accomplish the things we need to do in order to win." – *Holly G. Green, CEO, The Human Factor*

The best way to gain focus is to demand focus. Urge the team to focus on winning, not on tweeting. This focus involves breaking bad habits like constantly checking email. When planning short meetings, require attendees to pay attention, and for longer meetings, schedule breaks for checking messages. Do not feel guilty for demanding focus because it is quite likely that the majority of the distractions have nothing to do with the meeting agenda.

Get your team focused on winning. Are the "necessary" distractions really necessary?

Processes: Innovative Capture and Proposal Managers borrow from best practice methodologies such as CMMI, PMI PMBOK, and ISO. These methodologies all herald the importance of repeatable processes as a means to make the most of our time. It is true that repeatable processes reduce errors and rework. However, often we blindly follow a capture or proposal process that was once innovative but has become nothing more than a habit. Some habits are bad habits that we need to eliminate.

For example, some companies follow a solutioning process that takes them down a time-wasting path of building storyboards to the subtask level. They get so focused on filling in the multitude of boxes in the storyboards that they forget to solution the value proposition. The result is very repetitive features, benefits and proofs text that is of little help to the writers. Blindly focusing on a process rather than creating a winning solution is a bad habit.

Another example relates to meetings. Often we try to be inclusive. We add so many participants to our meeting invites that our meetings (kickoff, tag-ups, color team reviews) become unwieldy. It wastes the Capture or Proposal Manager's time to manage an overly large meeting with too many talking heads. In addition, all of the individuals who are not really needed are wasting their time. Meetings come with an opportunity cost. Only those who must be there should be there.

Examine your processes. Are some of them bad habits? Which ones can be eliminated or revised?

Technology: There's an app for that! Time management apps that you can download to your smartphone, laptop or tablet abound. All have free versions as well as paid versions with greater functionality. My favorite? The Komorian Eternity Time Log for iPhone or iPad has features such as the ability to define and time personal and work activities, review time logs and calendars, run detailed reports and pie charts, back up data and export results to fully analyze how you spend your time and thus gain greater productivity. Similar highly rated apps include HoursTracker, My Hours, Eternity Time Log, and aTimeLogger. The APMP Reporter recently referenced a list of free time management apps perfect for business including Toggl, My Minutes, RescueTime and Paymo. Options abound.

Use time management apps to best advantage. Can you leverage technology to analyze your time, eliminate time wasters, get more productive, and have more hours in the day for your personal life?

People, processes and technology innovations can save time or be time wasters. Be sure that you understand the difference.

Lisa Pafe is a CPP APMP, PMI PMP, speaker, LinkedIn Publisher, and ISO Internal Auditor with more than 24 years of capture and proposal experience for small to large companies serving civilian and defense agencies. She is the Vice President of the APMP NCA and was the Chapter's Speaker Series Chair for two years. Prior experience includes: VP of Corporate Development at Ace Info Solutions, Inc., President of Vision Consulting, Inc.; VP of Business Development for GovConnect, Inc.; and Director of Marketing for MAXIMUS, Inc. She holds a B.A. from Yale University, MPP from Harvard University and MIS from The George Washington University.

Fun Fact...

Leonardo da Vinci could write with one hand and draw with the other at the same time.

www.biography.com

Legal Corner

Time Management – Do As The Law Says, Not As I Do

by Shlomo D. Katz, Counsel, Brown Rudnick LLP

The theme for this e-zine issue is "Time Management – How do you enjoy your family vacations and manage busy season?" Ironically, I am writing this on a family vacation, where 40 children and grand-children are celebrating my in-laws' 50th wedding anniversary. I know you join me in wishing them many more happy years together.

Having failed to manage my own time so that I would finish this article earlier and could fully enjoy my vacation, I'll have to write about a different topic. Let me tell you instead about some new and not so new legal requirements that affect how Federal Government contractors manage their employees' time and, in particular, how they compensate employees for their time. Successful contractors understand that these requirements affect their profitability as well as their eligibility to perform contracts, and they factor the requirements into their proposals. That means you should care about them too.

In February of this year, President Obama issued an Executive Order requiring that no worker on a Federal Government contract be paid less than $10.10 per hour. This rule has not taken effect yet; the U.S. Department of Labor ("DOL") and the Federal Acquisition Regulation Council first must issue regulations to implement it. However, once it is effective, it obviously will impact the prices that some contractors charge.

You may be thinking that this is not relevant to you because all of your proposals involve highly-paid workers who already make far more than $10.10 per hour. However, it remains to be seen whether boosting the wages of the lowest paid workers will lead to wage inflation that affects even highly-skilled, highly paid information technology workers or construction workers.

Even if that does not happen, IT and construction workers, as well as most other workers on Government contracts, already have their wages regulated by the Government. Construction workers are covered by a law called the Davis-Bacon Act ("DBA"), which became law in 1931. The DBA applies to contractors and subcontractors performing on federally-funded or -assisted contracts in excess of $2,000 for the construction, alteration, or repair (including painting and decorating) of public buildings or public works. DBA-covered contractors and subcontractors must pay their laborers and mechanics employed under the contract no less than the locally prevailing wages and fringe benefits for corresponding work on similar projects in the area. By law, DOL determines such locally prevailing wage rates and publishes "wage determinations" ("WDs") to let the contracting officer and the contractors know what the applicable wages

> The government intends to include the new minimum wage requirements in every contract or solicitation for covered contracts issued on or after January 1, 2015.

and benefits are. A WD generally covers a county or a few counties, and sometimes an entire state. The wages that are paid to local unionized workers play a significant factor in DOL's determination of what "prevailing" wages are, but the actual WDs apply whether you, the contractor, are unionized or not. Contractors are responsible for factoring these wages and fringe benefits into their proposals; failure to do so will mean that you perform at a loss.

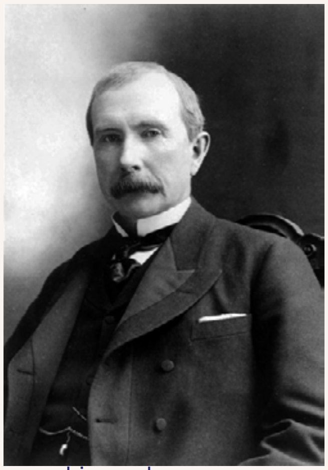
Similarly, a law called the McNamara-O'Hara Service Contract Act ("SCA") requires contractors and subcontractors performing services on prime contracts in excess of $2,500 to pay service employees in various classes no less than the wage rates and fringe benefits found prevailing in the locality, or the rates (including prospective increases) contained in a predecessor contractor's collective bargaining agreement. For the SCA, too, DOL issues WDs for a county, a group of counties or an entire state. Again, contractors are responsible for factoring these wages and fringe benefits into their proposals; failure to do so will mean that you perform at a loss. Worse yet, failure to adhere to the SCA can result in a contractor being "debarred" (excluded) from Government contracting for three years. That's a long time in this business.

Each of these laws, as well as others that I have not mentioned, can impact not only your price, but also your technical proposal. For example, the decision where to perform the work (when that is a choice) or which labor categories to propose may be a function of SCA requirements. Therefore, it is a must for proposal professionals to have at least some understanding of what these laws require.

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

Fun Fact...

When adjusted for inflation, John B Rockefeller is the richest man in history of the world with a net worth 10 times more than Bill Gates.



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Proposal Time Management Secrets

by Tim Pepper

Proposal time management is no different than any other project. Over the years I have heard people discuss how difficult their schedules are, how urgent deadlines loom, and the helplessness of action items beyond their control. Get over yourselves. Proposals are not in a special category of life. Most people struggle with striking a work versus personal life balance in whatever their profession. Doctors, lawyers, architects, programmers, welders, painters, plumbers, postal employees, and so on all face the same time management challenges.

How many stories have you heard of proposal folks heroically working long hours into the night and over weekends with the finished proposal delivered with moments to spare? I consider those anecdotes tragic, not heroic. A proposal professional should be able to properly manage timelines to prevent such events, or at least minimize them to the rare exception.

My headline lied. There are no proposal time management secrets. You can find them in hundreds of time management self-help books published in the past century. Some of the consistent advice distilled into proper context for this audience includes:

Set realistic proposal milestones and enforce deadlines.

A proposal schedule begins with the delivery dates and backs up from there. Begin with the end in mind and lay out the steps to achieve success. If writers miss a deadline, make a decision to proceed with reviews with or without their content. Management questions about the missing content can be handled with grace and mercy or by "throwing the slacker under the bus" as conditions warrant. Use the latter method sparingly.

Budget for some slippage but work with contributors to minimize the occurrence.

As the proposal manager, you may not have the luxury of choosing your proposal contributors. You may receive available (leftover) personnel with no motivation, proposal experience, or writing skills. You may also receive highly motivated, experienced writers whose jobs depend upon a winning proposal. Whichever you get, frequent communication is required to assess strengths, weaknesses, and monitor progress in time to adjust schedules accordingly.

Plan for contingencies.

Develop your proposal schedule from a pessimistic mindset and as each obstacle is cleared, grow cautiously more optimistic. Expect shipping delays caused by weather, airplane mechanical breakdowns, auto accidents, or any of the dozens of other horror stories told by old proposal professionals. Minimize the chances of single path failure through solid backup plans and alternate delivery methods. Two boxes shipped from the same location to the same destination with the same carrier on the same day do not count as alternate delivery.

Plan your vacation.

If you are as fortunate as I am to be the beneficiary of a full opportunity pipeline with additional unplanned pursuits that pop up frequently, you need time off to recharge. People are more than cogs in a proposal machine. They are both more resilient and more fragile than that comparison. But if you run the engine too hot and too hard, a breakdown will occur. Long before a breakdown in health or exhaustion happens, efficiency and quality begins to suffer. Put your vacation on the calendar as solid as any other proposal milestone. Buy the tickets, make the reservations, schedule the time with family and friends. They are as important as any other dates in your life, even proposal deadlines.

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 CF.APMP certified since 2010.

Avoid The Red Team II Monster By Implementing Efficiencies

by Brenda Crist

There is nothing more I dread than a Red Team II or even Red Team III. It means the entire bid and proposal team didn't produce a compliant, strong, and compelling proposal. In addition to inviting the concern of executive leadership and dragging down the morale of the entire bid team, Red Team II or IIIs also result in long days and weekends full of work.

I try to avoid them at any cost. My best defense is a good offense. If I am lucky I will arrive before the solicitation is released so I can work with the Capture Manager or team to develop an information collection plan, frame the solution, validate it with the customer, and optimize it. This is not often the case, because as a consultant, I usually arrive after the RFP is released.

In my experience, what the team does the first week after a solicitation is released can have a tremendous impact on whether we end up working long days and weekends. Here are five time saving processes I implement in addition to a good Kick-Off Meeting to gain efficiencies:

1. Conduct a Compliance Review
2. Conduct a Solution Review
3. Conduct a Price Review
4. Communicate the Solution to the Team
5. Create a Production Plan

Implementing efficiencies during week 1 can help you avoid the Red Team II Monster!

Conduct a Compliance Review: As soon as the proposal is released, I prepare a compliance matrix that maps solicitation requirements to the proposal response. The task can often be more of an art than a science, because I often find the instructions, evaluation criteria, and requirements are not clear, conflicting, or two-three times larger than the page limitations. I recommend having the Capture Manager/Bid Team Lead and a few members of the Bid Team review the compliance matrix to verify it will result in a compliant response. If the team has questions, they should immediately submit written questions to the Contracting Officer to resolve them.

Conduct a Solution Review: The solicitation release invariably causes some changes to the pre-solicitation solution. I recommend conducting technical, management, and past performance reviews to determine how solution gaps can be filled, how weaknesses can be mitigated, and how strengths can be optimized and further substantiated by solid quantitative proof points. The Bid Team should quickly compare their updated solution to the customer's evaluation criteria and verify it can still be highly ranked, and if not, determine what needs to be done to raise the score. The solution should be frozen as soon as possible barring any unforeseen changes caused by final pricing or amendments.

Conduct a Price Review: Once the solution is frozen, I recommend the pricing team verify they have all the information to generate the pricing volume and that they immediately alert the Capture Manager and Technical Volume Lead if they must change or tweak the solution to fit their price-to-win model. The Pricing Team should also communicate pricing requirements to the subcontractors, immediately determine if they are showstoppers and communicate their findings to the Capture and Proposal Managers.

Communicate the Solution to the Team: By the end of the first week, the Solution Architect, Business Lead, and Past Performance Lead should be able to communication the solution strengths to all the proposal writers and company executives. All writers should understand how to communicate the company's strengths, mitigate its weaknesses, ghost the competition, and present a clear and compelling approach from the customer's point of view.

Create a Production Plan: The very last thing I do during Week 1 is to create a production plan that describes how we will edit/review, produce, and ship the proposal in compliance with the customer's requirements. I produce primary and contingent plans for production and ensure we leave at least 10% of the proposal schedule for production.

In summary, producing a compliant proposal outline, generating a "strengths-rich" solution with a correlated price, and effectively communicating the solution to the proposal writers as soon as possible after the solicitation release will help banish the Red Team II Monster and make your vacation much more enjoyable. Creating a sound production plan well in advance of the proposal due take date will ensure your proposal is delivered on time even if you are on vacation.

Brenda Crist has 25 years of experience providing capture, proposal, and program management support for information technology companies serving the Federal market. She is currently the Managing Director, Strategic Solutions at the Lohfeld Consulting Group. Prior to becoming a full-time proposal professional, Ms. Crist served as a Group Manager for OAO Corporation and Project Manager for Harris Corporation. She has provided system, application, and network management solutions for civilian and military clients. She is a former President of the APMP National Capital Area Chapter and a speaker at several APMP National Conferences. She holds a Masters Degree in Public Administration, is an APMP Fellow, and is certified at the APMP Professional Level.

One Way to have a Great Vacation during Busy Season

Russell Smith

The way vacation season and busy season coincide is an occupational hazard for most proposal professionals. Below is a description of how I get around the hazard and have a good time.

We usually spend two or three weeks in Delray Beach, Florida, a resort and retirement town just north of Ft. Lauderdale. The usual drill for the day is to get up by 8:00 AM. Over the next two hours we go running, get the children moving, have breakfast, and do odds and ends. I then drop my wife and the children at the beach about 11:30 AM.

I come home and work about four hours at my desk which is in a comfortable nook in the laundry room. Since we don't have a router there, a Verizon "hotspot" solves the problem.

I join the family at the beach about 4:00 PM, which is just in time to enjoy a few rays, go in the water with the children, and then go to the strip for happy hour and dinner. If needed, it is possible to get in another hour of work at the end of the evening. In emergency situations, I can take the laptop and router card to the beach and work a short time under an umbrella.

It is important to not let yourself get sucked into an 8-hour day. After all, this is your family and your unwind time.

Capture, Coffee And Conversation!

by Ros Angus

The NCA chapter hosted a very dynamic and lively Capture Power Breakfast at the Fairview Park Marriott in Falls Church, Va on June 24th.

The NCA chapter hosted a very dynamic and lively Capture Power Breakfast at the Fairview Park Marriott in Falls Church, Va on June 24th.

A total of seven designated capture experts were gathered in one room to provide insights into multiple, capture-related topics, via short presentations and face-to-face discussions with attendees directly at their tables. Each of our speakers engaged in discussion with attendees on their chosen topic, with rotations to a new table every fifteen minutes in a "speed networking" format, hence, power breakfast! (We made sure to have lots of coffee at the ready from the get-go!)

Howard Nutt kicked off with a high-energy keynote presentation on situational awareness during the capture process and mitigating risk at every stage.

Special guest speaker, Bob Johnson, then presented on the topic of conducting effective capture, messaging and customer interaction through digital marketing.

Then began the rotations! All the attendees had the opportunity to engage, in succession, with each of our capture experts at the breakfast tables. This gave every person direct access to each speaker, and the opportunity to ask questions and participate in discussion in a more intimate, conversational fashion.

By necessity, the event was run with military style precision, to ensure that everyone got face time with each of the experts. (Tempting as it was to ask everyone to synchronize watches, that might have been going too far!) The biggest challenge of the morning was keeping time due the animated and engaged conversations that were going on all around.

Some memorable highlights from roundtable discussions:

Cheryl Howarth of GDIT (aspiring ball room dancer!) spoke on the topic of "when to say no" in the gate review process, focusing on the necessities rigor and process in the sometimes painful but necessary decision to no-bid.

Larry Philips of Northrop Grumman Electronic Systems (who funded his way through Michigan State University as a professional magician) emphasized the point that customers buy benefits, not features, with the simple but oh so memorable analogy that people buy "warm butts" when purchasing cars with heated seats… and who cares what the technology is that provides it?

Bob Johnson of ProCM (whose entire immediate family is in the proposal business in one form or another) highlighted a crucially important aspects of thought leadership, and changing culture in the organization so that every person is focused on winning versus bidding – a very different mindset from the common scenario of people being pulled into assignments or color teams who view them as tasks or obligations, versus opportunities to win!

Howard Nutt (one of the original 28 founding members of APMP – with a membership number of #0007!) spoke further to the merits of applying the CMMI model to the business development process, to improve quality – and results – at every stage. We'll take that shaken, not stirred.

Just in case this is of interest, Howard and other APMP experts offer several training courses that can be viewed at http://www.apmp.org/default.asp?page=UpcomingEvents.

Heather Gray of CACI (who studied Japanese and spent a year in Japan after graduating) spoke on the wider topic of leveraging both internal and external groups and resources to leverage your BD career.

The resounding feedback from attendees was extremely positive; even the most seasoned participants were able to ask questions and discuss scenarios relevant to their own situations, and compare the experience of others, and gain valuable additional knowledge. Many cards were exchanged, and no doubt, many follow-up discussions will continue!

Bios:

KEYNOTE SPEAKER:

Howard Nutt - Director of the Center for Business Development Excellence, The Association of Proposal Management Professionals.

Topic: *"Maintaining Situational Awareness on Capture and Delivery Risk."*

Howard Nutt is currently Director of the Center for Business Development Excellence, a division of APMP dedicated to BD excellence through the Capability Maturity Model® for Business Development and continuing research, benchmarking, and innovation in BD best practices. Before joining APMP, Howard was Executive Director of the non-profit Business Development Institute International, prior to which he consulted with Shipley Associates where he established and managed the BD Process Consulting Practice and went on to become a Vice President and Partner. He helped organize and is a charter member and fellow of the APMP, and he has worked with both large and small corporations in the USA, Canada, Mexico, Europe, India, and the Asia Pacific.

SPECIAL GUEST SPEAKER:

Bob Johnson – Strategic Health IT, Definitive Logic, Co-Founder and President-elect of ProCM.org

Topic: *"Customer Intelligence Integrated into Digital Marketing and Customer Communication."*

Bob Johnson's 30 plus years' executive experience covers the entire Federal business life cycle from early opportunity identification and qualification, capture and proposal management to business unit operations and contract close-out. He is co-founder and President-elect of the Professional Capture Management Forum (ProCM.org), a non-profit association for business development, capture, solution architects, price-to-win and competitive assessment – the 5 tenants of winning new business. Mr. Johnson served as Senior Advisor to the Indonesian Ministry of Science & Technology and the former Vice President and Minister of Science & Technology Dr. B. J. Habibie (1991-1998). He earned his BA in Business Administration and Finance from Parsons College in 1971.

INDUSTRY EXPERTS:

Cheryl Howarth - Director, Capture Management at General Dynamics Information Technology

Topic: *"When to Say No"*

Cheryl Howarth is a Director of Capture Management for the Health & Civilian Solutions business unit of General Dynamics Information Technology (GDIT). Prior to joining GDIT in 2010, Ms. Howarth was a Capture Manager with AT&T Government Solutions for 7-1/2 years. Her 30+-years' career includes various marketing and business development roles, including creating a new revenue stream for Ericsson GE's mobile radio product line and 13 years launching and developing the mobile satellite communications technology within the transportation industry.

Heather M. Gray, PMP, CP APMP - Director, Capture Management at CACI

Topic: *"Establishing and leveraging internal employee resource groups, external groups and associations to maximize your full BD potential"*

Heather Gray is a Director of Capture Management at CACI where she has supported the business development organization for almost ten years. She is PMI PMP-certified, APMP Practitioner-certified and Shipley-trained with an extensive background in full lifecycle proposal development. Her experience includes successfully managing large ($100M+) and complex opportunities for defense, federal civilian, and intelligence community (IC) customers. Committed to excellence, Heather manages capture and proposal personnel, aligns bid resources, develops strategy and improves processes, and trains team members to effectively lead growth. She is the founder, organizer and chair of CACI's Women in Business Development (WiBD) employee resource group (ERG).

Dr. L. M. Phillips - Senior Manager, Capture Strategy, Capture Leadership Center at Northrop Grumman Electronic Systems

Topic: *"Capture is about Problems not Solutions, and Benefits not Technology Features!"*

Larry has over 40 years of experience in Government Acquisition, from both the governmental and business sides of the process. He has worked for Hughes Aircraft, Raytheon, General Dynamics and is currently a Manager of Capture Strategy at the Northrop Grumman Electronic Systems Capture Leadership Center. His Doctorate is from University of Maryland in Business and he is a professor at University of Maryland in the Graduate School of Management and Technology. His article titled "How Do You REALLY Influence A Customer," will be published in an (WHICH ONE?) upcoming issue of the APMP Journal.

Rich DeMasi – Senior Manager, Business Development at Northrop Grumman Technical Services

Topic: *"Effective Color Teams for Captures and Proposals"*

Rich DeMasi is a seasoned business development professional with over 32 years of experience encompassing business development, marketing, strategic planning, facilitation, capture, and proposal development for the Northrop Grumman Corporation, a leading global security company providing innovative systems, products and solutions to government and commercial customers worldwide. In his current role Rich provides guidance and coaching to capture and proposal teams, facilitating their win strategies, capture analyses and proposal color teams.

James K Smith – Senior Capture Director at CACI

Topic: *"What does the Government really mean by Best Value Tradeoff Evaluation Approach?"*

James is a Senior Capture Director at CACI, managing the company's largest captures. Recent wins have included the Army's SSES NexGen ($7B); TAOSS ($500M); RPTIS ($200M). James is currently Capture Manager for large, mission focused IDIQs such as the Army's RS3 ($30B) and the Air Force PEITSS ($500M) contracts. Win strategy has also included competitive Task Order bid positioning after award. Prior to CACI, James was a Global Account Director at SAP, leading team account strategy for the largest SAP customers, including Exxon Mobil, J&J, Dupont and Coca Cola, among others. James has lead Business Development for several small to medium-sized federal contractors after starting his career with Northrop Grumman, where he lead a large Proposal Group at Sandia Labs.

Ros Angus serves as Director Business Development with Proposal Development Consultants, LLC. She has more than fifteen years' combined executive search and contingent staffing and management experience, advising Fortune 500 companies and federal government contractors to provide tailored human capital solutions. She has served as a member of the APMP-NCA committee in various capacities since 2010.

APMP-NCA Website Gets A Major Facelift

by Tom Skrobacz, APMP-NCA Technology Chair

During June of 2014, the APMP National Capital Area Chapter launched our long-awaited website with a fresh new look at www.apmpnca.org. Our new site greatly improves navigation and includes a host of new features to address the evolving needs of our membership.

Stop by and have a look. The site is built using a responsive design that enables it to scale dynamically for your computer, tablet or mobile phone. It also includes an extensive knowledge base, in the members only section, providing chapter members the latest information from your peers involved in government and commercial business pursuits. Simply click on our schedule of events to add events to your personal calendar or connect with chapter members via one of the many social media sites easily accessible from the footer on each page. These are just a few of the exiting new features available that address the most requested capabilities!

APMP-NCA Dinner Meeting – March 19, 2014

"The Price Is Right…Or Is It"

by Russell Smith

What is more important in determining Price to Win (PTW): the customer budget, competitor strategies, or your own Basis of Estimate (BoE)? The panel discussion on pricing strategy shed light on this complex topic in an era of increasing price competitiveness. Two pricing consultants and a government acquisition specialist shared their perspectives May 14 at the APMP-NCA Speaker Series dinner event at the Tysons Westin at an event coordinated by Jeremy Arensdorf, Vice President of Jefferson Consulting.

Left to right – Jeff Saylor, Gary Fitch, and Jacob George

Panel moderator Lee Cooper, a consultant and former Raytheon executive with extensive hands-on experience in price strategy, led a lively discussion and Q&A session. Panelists included Jeff Saylor, Director of Contract Services, Policy and Administration for the U.S. Department of Labor's Employment Training Administration (ETA); Gary Fitch, President of White Owl Systems, and a pricing consultant to government contractor firms; and Jacob George, Director of Finance and Pricing at Red Team Consulting. Our sponsors included Red Team Consulting and Lohfeld Consulting Group.

Lee Cooper pointed out how pricing has become even more important in the era of the Sequestration, using the PTW model of a "Y". One diagonal is the customer: contractors must know their budget and financial situation. The other diagonal is the competitor, their history of pricing this type of work, and what strategies have they used successfully. The vertical member of the "Y" is your company – what can you bid based on your BOE? It is an intellectual process to bring together all three parts of the "Y in a way that will let your company do the job at a lower price than the customer estimate or the competitors. Gary Fitch advised that we must price as if every day a competitor is trying to put us out of business.

Lee Cooper and Chapter President Maryann Lesnick

Jeff Saylor stated that even in a Low Price Technically Acceptable (LPTA) situation, the Government still requires realism. Government analysts populate the bottom-line numbers into spreadsheets, looking for the outliers. For example, five companies may be bidding $100 an hour for a given labor category, but one bidder is at $80 and one at $120. The Government looks at the $80 to see how it was put together. Everyone else is at $100, so that is realistic. Has the $80 person found a solution that is acceptable at a lower price? On a Best Value procurement, the technical panel determines which companies are technically the best using the evaluation scheme. A superior technical score and a realistic price of $100 wins. To gather more information on realism, the Government researches comparable services or products on the Internet and GSA schedules, and also develops the independent Government cost estimate.

The Audience didn't miss a Word of this Presentation

Many bidders are confused as to the difference between realism and reasonableness. Jacob George explained that price realism involves comparing the pricing among the bidders and look at outliers to determine if the price is too low. The purpose is to avoid a low-ball bid. Reasonableness is the results of the technical evaluation of the proposed solution against the requirements. When there is full and open competition for a fixed-price contract, the purpose of price reasonableness is to determine whether the price is too high.

The panel also discussed how contractors try to "game" the RFP to win. While Jeff Saylor pointed out that the Government tries to write a really tight specification, bidders still try to find loopholes. Lee Cooper told a story about a bidder who came in 40% lower by finding every loophole in the RFP and then successfully obtaining a $175 M Engineering Change Proposal (ECP) after the award.

The panel agreed that PTW is needed on all proposals and that the Government often misapplies LPTA to obtain bids within tight budget constraints. Gary Fitch discussed ways to educate the customer on when it is appropriate to use LPTA and when it is a misuse of the concept.

The Speaker Series Planning Committee would like to thank our speakers, moderator, and sponsors who made this event a success. We look forward to seeing you at our July 16 Breakfast: Winning and Leveraging IDIQs in a Shifting Market.

Russell Smith, CP APMP - Russell has been an active member of APMP since 1994. He served on the Board from 2000 thru 2004. During that time, he completed one term as Program committee lead and one term as President of the NCA chapter

Stop Wasting Time On Proposals!

by Chris Simmons, founder and principal, Rainmakerz Consulting LLC

Time has been one of the most talked about topics since the ancient Egyptians established the 24-hour day a long time ago. Time continues to be a popular and increasingly diverse topic. My recent Google search yielded a whopping 9 million hits on time management subjects ranging from time-and-motion studies to self-help. It is no coincidence that when asked about the most significant issues and challenges proposal professionals face, the responses most often mentioned are related to time. "Not enough time to respond"…. "No respect for proposal schedule deadlines"…. "Limited resources that increase time pressures," and the list goes on, and on, and on.

It's a fact that before most proposal efforts start, precious days (and sometimes weeks), are seemingly wasted away. Capture managers are either struggling to get a bid/no bid decision, or securing the resources to kick off the proposal. To make matters worse, most proposals require accelerated development schedules (15-30 days) with little or no regard for the people responsible for managing, writing, and supporting the proposal.

The challenge of creating a compliant, compelling response to an RFP becomes a daunting task almost doomed for failure even before it begins—largely because there isn't enough time. With so much time wasted and such little time to respond, proposal teams have to sacrifice their nights, weekends, and (in too many cases) even their health, just to get a competitive product out the door on time. What's a proposal manager to do?

Unfortunately there isn't enough time to describe all the ways you can better manage your proposal — I have time management challenges of my own and so do you! In the interest of time, here are seven high-impact recommendations (with specific actions you can take) that are guaranteed to help you get more out of your next proposal effort in less time.

1. Set ground rules early … and often.

Thorough planning is one of the cornerstones of managing time efficiently and effectively. Most teams rush to kick off the proposal before they are really ready. However, experts agree that up to 15 percent of the total proposal development schedule should be allocated to carefully planning the kick off meeting—that means 4-5 days after RFP receipt for a 30-day turnaround schedule. The kick off meeting should include a detailed Proposal Management Plan that has been reviewed and approved by both the capture and proposal teams, especially the calendar/schedule, resource assignments, daily stand-up/status call logistics, and rules of engagement.

Actions you can take:

- Select a proposal development methodology and approach that takes current proposal priorities and constraints into account. For example, three proposal (color)

Experts agree that up to 15 percent of the total proposal development schedule should be allocated to carefully planning the kick off meeting—that means 4-5 days after RFP receipt for a 30-day turnaround schedule.

reviews can work for a 30- but usually not for a 15-day schedule.

- The industry average for writing new proposal narrative is four pages per day. If a 40-page section is assigned to a writer with only five days to complete the task, you either need to request another full-time resource or agree that the section will be based primarily on boilerplate (not recommended).
- Set daily stand-up calls for an off-hour time that is generally convenient for all participants to avoid rush hour traffic and to take additional time zones into account (if applicable). For example, stress the importance of being in the room or on the telephone at 3:00pm—five minutes early for a 3:05pm meeting. If you start the meeting on time, every time, people will get the idea that you are serious and that showing up late wastes everyone's time.

2. Organize the work into small, manageable chunks.

One major time-waster is letting proposal teams go off for days at a time to start writing before: 1) Agreeing on how to interpret the requirements; 2) Developing an instruction-compliant outline, and 3) Sufficiently discussing and documenting a compliant and compelling solution that addresses customer evaluation criteria and hot buttons.

The Proposal Management Plan should include a number of iterative steps in the schedule designed to keep everyone on track and on time. Specific proposal milestones should include but not be limited to: RFP review meetings, RFP Q&A meetings, outline reviews, solution development meetings, storyboard/module plan reviews, story map reviews, interim peer/proposal management reviews, and color (Blue, Pink, Red, Green, Gold, and White Glove) reviews.

It's the proposal manager's job to make sure individual team members achieve milestone deadlines. It's the proposal team members' responsibility to let the PM know that they can't make the deadline and why.

Actions you can take:

- Set the expectation in the kick off meeting that pens-down deadlines are for the last section submitted.
- Avoid a COB deadline that can be interpreted many different ways and can lead to late night typing and thinking errors.
- Stress specific deadline times in addition to deadline dates.
- Work with individual team members to agree to specific deadline times with the easiest sections completed 1-2 days before the pens-down deadline for the last section.

3. Focus on daily status at stand-ups.

Let's face it, many of us are still kids in adult bodies and sometimes proposal managers are reduced to the role of glorified babysitters. Like most kids, proposal team members will test the limits of authority to see how much they can get away with.

Actions you can take:

- Your daily stand-up meeting should include a status summary that includes each section/subsection; with a simple color-coded status indicating how each section is tracking according to plan. The meeting should include a review of action items with specific owners and dates.
- If deadlines are not met, or if the quality of the deliverables is not up to your standard, the status summary becomes a "sheet of shame" that is posted on the war room wall, included in the electronic status report folder, and a daily reminder at stand-up for all to see.
- If a deadline is missed, you should schedule a "time out" with your team member to discuss the specific circumstances and confirm your mutual understanding of what happened. Decide to reset expectations, consider a reassignment, or if the problem continues, see recommendation #5.

4. Keep interactions short and to the point.

Most people dread the idea of going to meetings. It's no wonder since most meetings are poorly managed, take too much time, or are altogether unnecessary. If a formal meeting is in order, identify the target audience in advance and check attendee schedules before sending a meeting invitation.

Actions you can take:

- Include an agenda with specific time allocations for each topic according to current priorities.
- Manage the meeting according to the agenda and schedule to finish early enough to review action items, owners, and due dates.
- Keep all conversations (formal and informal meetings) focused and action oriented. Look for ways to avoid or prevent in-depth personal conversations while on the job.
- Talk to habitual violators individually, and consider separating or moving team members to another location.

5. Don't hesitate to escalate.

A big part of having enough time to complete a quality proposal successfully is making sure the right resources are in place to do the job. There are all sorts of resource mismatches to make the process painfully inefficient, for example, the right people in the wrong roles, the wrong people in the wrong roles, not enough people in key roles.

Actions you can take:

- Make sure that the proposal kick off meeting includes a proposal organization chart with clear lines of authority and a description of the roles and responsibilities of each team member.
- Avoid scheduling work on weekends and holidays in the initial proposal schedule, but prepare yourself and your team to work them if (when) it becomes necessary.
- If the right resources are not in place, raise the issue with the appropriate proposal, capture, or business development manager. Explain the benefits of making resource adjustments and the risks and trade-offs of not making them.
- Provide decision makers with options and resource alternatives to reset expectations if necessary.

6. Communicate, communicate, and communicate some more.

It simply cannot be emphasized enough that the most effective way to manage your proposal time is efficient and effective communication. When to listen, when to speak, what to say, how to say it, who to say it to, and when to say it. One of the most common proposal team problems is the inability to communicate even basic ideas. All too often incorrect assumptions, miscommunications, or a simple lack of communication leads to lost opportunities for success.

Actions you can take:

- Proposal war room walls, meeting minutes, and status meetings can be effective, but are usually no replacement for managing by simply walking around. On the surface, it may seem like a time waster, but this simple act is likely to uncover potential miscommunication landmines. This management approach demonstrates your interest in individual team members and makes the communication channels more efficient and effective.
- Know what method of communication to use and when. For example, use tools available

Take action now to save time later

to you such as documentation management software like SharePoint or Privia, but don't rely on email messages and file downloads to accomplish what a simple telephone call or "how is it going?" visit can do.

- Answer telephone calls with a return call (not an email message) unless an audit trail is otherwise required.
- Avoid instant message type email messages that go back and forth multiple times. Pick up the telephone and have a real-time conversation.
- It should go without saying, never, ever, send a chain mail, joke mail, or other non-work related email message to your team.

7. Make it better for the next time.

Even the most prepared and organized teams with highly skilled and qualified staff fail to win new business. Why? There are simply too many variables in the process to guarantee success—even if the proposal team remains constant. Despite what might seem like the same old people doing the same old things every time, each proposal effort has important and valuable lessons that can be learned and applied to the next proposal to make the experience more rewarding (getting it in) and successful (getting the win).

Actions you can take:

- Take the time to document lessons learned throughout the proposal development process. Organized your thoughts, for example, across people, process, and technology dimensions with recommendations for future improvements.
- Look for opportunities to solicit written feedback on your performance and the performance of individual team members to determine what they can do better or different. Perhaps they simply shouldn't be considered for similar assignments in the future.
- Take the time to reflect on the strengths and improvement areas of your proposal effort. Summarize your thoughts in action-oriented recommendations.
- Present your findings to the appropriate capture of business development managers and suggest a time to discuss.
- Make the proposal lessons learned activity part of your standard process for every proposal and integrate it with the proposal debrief if applicable.

Take Action Now: Stop wasting precious time and start managing your time better. Write down the 2-3 recommendations or tips that resonate with you the most. Think about how to incorporate these into your everyday routine. Take action now, or you may not have time to do it before your next RFP response.

"Time is all you have. And you may find one day that you have less than you think." — Randy Pausch. The Last Lecture

Chris Simmons is a thought leader, public speaker, award-winning author, APMP Fellow, and the founder and principal member of Rainmakerz Consulting—a business development company. He is the former vice president of the National Capital Area chapter and regular contributor to APMP publications, presentations, and educational events. Chris was nominated for the Top 25 Consultants award (Consulting Magazine) in 2012.

Still confused or looking for more detailed suggestions? Take time now to send feedback, comments, or questions about this or other challenging proposal issues to Chris at chris@rainmakerz.biz or 202-255-2355. Visit www.rainmakerz.biz.

APMP-NCA Breakfast Meeting – July 16, 2014

"Winning And Leveraging IDIQs In A Shifting Market"

by Russell Smith

Agency-specific indefinite delivery indefinite quantity (IDIQ) contract vehicles are receiving an increasingly large portion of Federal government spending, gaining market share previously enjoyed by government-wide acquisition contracts (GWAC) and multi-agency contracts (MAC). The APMP-NCA July 16 Speaker Series breakfast examined how businesses – large or small – leverage these highly competitive vehicles to win business and increase revenues. Event moderator Russell Smith, event co-chair and President of Organizational Communications Inc. (OCI), began the discussion with this question: *"Where can you spend a million dollars on a chance to win an empty bucket?"* The answer was obvious to everyone who has worked an IDIQ proposal.

Our first presenter was **Mark Day, Deputy Assistant Commissioner, Integrated Technology Service at GSA.** Mark serves as COO over $21B in IT services sales, and handles issues relating to Schedule 70, NETWORX, GWACS, Secure Identity Management, Outsourcing, cloud computing, IT Consulting, IT security, and others. Mark affirmed the answer to Russell's opening question by saying that many times companies win the IDIQ and then never win any business through it.

Mark said you must know how to sell the IDIQ contract once you have won. A critical factor in IDIQ success is establishing trust with the customer. This can come only if you are fully knowledgeable about the vehicle. Which agencies can use it and how? If the customer perceives you are trustworthy and that the vehicle is easy to work with, they will be more likely to put work through the vehicle, and to work with you.

One good way to grow your understanding of IDIQs is to engage in Special Interest Groups (SIGs). Most contract vehicles have SIGs where contract holders can share information and build relationships. SIGs can help businesses understand the contract, the scope, and the rules.

Left to right, Dan Shyti, Mark Day, and Jody Ganzermiller

Another way to improve your knowledge and grow your IDIQ contract is to visit with GSA, the agency Contracting Officer, the CIO and other stakeholders. These individuals cannot promote your company, but they can help you understand the rules. They can let you know what opportunities are coming up. They can validate the use of a contract. CO's frequently can and will tell your customer that, yes, you can use the contract in this or that way. If you make your customer's job easy, they are more likely to use the contract.

Mark noted that is also important to know who you are marketing and what you can do for them. Don't go in and waste an hour of the customer's time – do your homework. He suggested visiting the GS 14s and 15s, not just the CO or CIO. The lower down you go in the organization, the more likely you are to learn the customer's real problems, their real challenges, their preferences, and their relationships with other vendors. The government does not want to hear how "screwed up" they are – they know. But if you have done something to fix similar problems for another agency or have a new technology that cuts the Gordian knot— tell them about it.

Mark indicated that there are two people who have to say yes – the Program Manager and the Contracting Officer. If either says no, you are dead. Both have different issues and different perspectives. For their own reasons, they may prefer to use a Task Order vehicle or a requirements contract. Many agencies prefer to use their own staff for the things that are critical and to use contractors for things that are common across Government. The Program Manager is concerned about moving things forward the fastest way with the least chance of protest. And the Contracting Officer has to worry about the proposal process being in alignment with the law and taking the legal responsibility if things go wrong.

Contracting with the government is particularly difficult for small businesses. How do you get a foot in the door? With no past performance, how can the government trust you? Some agencies/programs have a lot of money and may be willing to take a risk and give you a chance. But these only do it seldom and with a compelling reason. The best bet for small business is to get on a team. Work with experienced partners to prove yourself and establish relationships with the customer. Mark also said he looks for contractors who are active in organizations like ACT-IAC. Join an ACT-IAC SIG. The government sees this as a commitment to partnership, and will be more willing to work with you.

Our second presenter was **Jody Gazermiller, Director of DHS Programs, Intelligence and Security at BAE**. Jody also has a 15-year background as a government executive, Contracting Officer (CO) and COTR. Jody said that it is not enough to just win the IDIQ, you must then win the task orders.

Many companies do not understand how to sell their IDIQ contracts, and just blindly bid on task orders. Make sure you understand the IDIQ program, and know the customers who can use it. If you bid blind, you have not made the necessary investments to win. Promote yourself to the customer, and work to gain intelligence and understanding. Jody emphasized the importance and value in attending IDIQ program management reviews. These are usually held twice a year, and there are always frank discussions and information sharing from which you can learn.

Jody pointed out that every agency manages its IDIQ contracts differently. It is important to understand the

agency, and have corporate commitment from top to bottom when you invest in an IDIQ vehicle. Do you have someone to receive the Task Orders? Do you have the BD, capture, proposal, and management support and capability to respond? If not, then you should not invest in an IDIQ. If you become an "empty chair" in the program, it hurts your reputation.

Jody talked about the importance of being compliant and following the RFP instructions. When in the government, Jody often received proposals that were non-compliant and presented content in the wrong order. Jody suggested that companies establish a task order handling process that is like a machine. How do you handle distribution of the Task Order RFP? Do you have a process and templates in place for preparing the response? It helps to have boilerplate for standard proposal pieces, but be careful to edit for the specific agency/response you are developing. A big mistake is to deliver a proposal and use the wrong agency name in your response.

IDIQ vendors must be willing to make a corporate investment. Jody recalled situations where the program manager left the company, and the program just dropped. Even if you are too small to have a dedicated program manager, you must provide resources to participate. You have to learn the rules, educate yourself and your company. Know and use your contract vehicle.

Jody highly recommended joining a SIG, and attending seminars and the Government's program management meetings. It is in the Government's interest to make the programs work, and they want to help you learn more about the contracts. SIGs make a difference for all players.

You can also go to the GWAC dashboard. These will often tell you who is buying, what products are being sold, and how and where to use your contract.

The ACT-IAC SIG for ALLIANT has monthly calls for the PMs, providing a forum for questions, discussion about marketing the vehicle, new customers, etc. The PMs and GSA leadership get together at least 2 times per year, and get to know each other well. This and other SIGs, and mini SIGs which often evolve, work to maximize the use of the contract throughout the federal government. SIGs foster both teaming and competition. When a Task Order comes out via ALLIANT, Jody noted that other ALLIANT PMs often asks if her firm wants to team with their firm. If both want to prime, they compare notes to see which company has the higher win probability based on incumbency, other work being done with that customer, past performance doing that particular type of work, CPARs, etc. If they agree that company 1 should prime and company 2 sub, they may agree to team on another opportunity where the sub has the higher win percentage – and the original sub is the prime and the original prime is the sub. The term "over/under" came out of this scenario. *"On the first opportunity, I am the prime (over) and on the second opportunity I am the sub to the same company that subbed to me (under). Yet on other TOs we are serious competitors."*

Attention to detail is important. Jody recalled a situation where a company won a cleared contract with a large staff. No one realized that a 60-day process was required to get the personnel badged to come to work. The company was good at proposals, but no one looked to see if they could deliver.

Jody also suggested to watch for Task Orders where the winner has failed to deliver. These projects may be ripe for a takeover.

Jody said to pay attention to the evaluation panel. There is always at least one person on the evaluation panel who really cares about the program. Help the evaluators score your proposal by following the instructions. If information is in the wrong order, it tells the government you aren't going to play by the rules and that you are a risky contractor.

Our third presenter was **Day Shyti, President of 4 Power Leadership**, a company providing leadership training. Dan Shyti shared insights gained from his extensive experience running a GWAC Center.

Dan suggested that you must communicate a 'rock solid' process in your proposal. It is also imperative to maintain customer satisfaction. You can check customer satisfaction through polls and surveys. Make sure any negative ratings are rectified, and track your resolutions.

Another challenge that surfaces a lot in large companies is that individuals or groups across the company may be using the same vehicle. Perhaps usage is organized by client or core competency – no one model fits all. One challenge is to make sure that your company doesn't submit multiple proposals. That can be pretty embarrassing, and tells the customer one arm does not know what the other is doing. For the ALLIANT bid, Dan's company had 13 divisions participating. He had to educate everyone and coordinate task order responses/performance across the company.

You also must educate your customers. Show your customer how to get delegation of procurement authority to get their own IDIQ. Then move incumbent work to a new vehicle.

Leadership is very important to the task of winning IDIQ business. Because no one has all the authority, and you must lead the group to make the right decisions in order to win business. The right persistence, presence, and selling convinces management to make the commitment and the other stakeholders to follow. There is a new game for capture. If you don't have the authority, you must lead.

Another big challenge is selecting which Task Orders to bid. You can shoot at everything or be highly selective. Dan has seen both models work. He believes highly selective targeting usually works best. For example, you can filter for tasks with more than 10 day turnaround, over a certain dollar threshold, and within your core competencies. If you are a small business, Dan suggested that it is a good idea to pick one or two things and do them well. Then you can tell a good story and be repeatable.

Dan also suggested a fast and effective triage process. It is a good idea to notify your subs immediately upon receipt of Task Order, because waiting has too much schedule risk. “We do a lot of ‘concurrent work’ in order to speed up the process. The objective is to make your Task Order process work like a machine.”

Prioritizing B&P is a challenge. Do you save B&P for big open procurements or for IDIQs? An advantage of IDIQs is that they can produce new business quickly, with awards in 60 – 90 days.

Last Words

Thanks to Dawn Chapman, my event co-chair. A special thanks to each of our presenters for an informative and engaging program. Afterwards, people were saying: “This was the best presentation of the year.” And one person said, “This was so good, I could listen to another hour of Q&A!”

Russell Smith, CP APMP - Russell has been an active member of APMP since 1994. He served on the Board from 2000 thru 2004. During that time, he completed one term as Program committee lead and one term as President of the NCA chapter

APMP-NCA & APMP International Upcoming Events

2014 APMP-NCA Mid-Atlantic Conference and Expo REGISTER!

Dates: 20 – 21 Nov, 2014
Location: Sheraton Premiere, Tysons Corner, VA

Our annual **Mid-Atlantic Conference & Expo** is the largest gathering of industry professionals in the National Capital Area. Join hundreds of other proposal, bid, capture, BD, and graphics professionals for this 2-day event focused on training and increasing your win rates.

Day 1: A full-day of specialized training provided by experts in various areas of our industry, ranging from certification training to FAR workshops.

Day 2: A rich array of learning experiences and development opportunities, delivered in five 4-session tracks. Our theme this year is:

"The New Normal: Strategies for Tomorrow's Market"

How does industry survive in the "New Normal", dealing with challenges such as:
Budget Constraints. Budget cuts, reorganizations, and layoffs are the "new normal" for the foreseeable future, as

agencies consider multi-year cost reduction strategies. How will that affect our bid decisions, pricing, and win strategies in the future?

Methodology Modernization. Like all industries, how do we evolve to meet the challenges of the new normal? Can we learn lessons from others, like software development or the ancient Norse cultures, to approach BD challenges with a conquering spirit and in more effective and agile ways?

Stakeholder Expectations. What do today's Contracting Officers want? How do we align our business strategies with the needs of our customers? How do we ensure our proposals are responsive?

Bid Strategies. How do you carry the corporate vision into bid decisions and strategies? What is important for capture and proposal success? What procurement trends and lessons learned can you draw upon in the future?

Although challenging, the "new normal" also brings exciting potential and opportunities. Join us in November to explore how the business development industry can face these challenges going forward. We've packed our agenda with new and insightful topics, delivered by an impressive team of speakers, who are ready to share industry best practices, thought-provoking ideas, innovations, and new developments shaping the future of our profession and the industry.

TRACK LISTING COMING SOON

Earn 10 CEUs toward your APMP Certification for full-day conference attendance (5 CEUs for partial).

The conference also offers a huge Expo, where vendors will present the latest tools and services they offer to increase your productivity, effectiveness, and win rate.

Pricing Information:

Early Bird (Ends October 1)
Members: $249
Non-Members: $299

After October 1
Members: $299
Non-Members: $349

Walk-in Rate
$349 for all

Sponsorship Opportunities Available!
Become a Friend of the Conference (name in the program): $100

Additional Sponsorship levels available: Contact Andrea Tasker

Conference Reception

We welcome all attendees to join us for a special reception on Friday, November 21 at 5:30pm, hosted by event sponsor, Shipley Associates

Note From the E-Zine Chair and Chief Editor, Jessica Douglass

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.

APMP Capture and Business Development Conference 2014

REGISTER!

Dates: Tuesday, September 23, 2014
Location: Hilton McLean Tysons Corner, McLean, VA, USA

PMP Members: $179

Non-members: $229

A continental networking breakfast, lunch and afternoon snack are included.

Senior-level business development, capture and proposal professionals are invited to attend the Second Annual APMP Capture and Business Development Conference on Tuesday September 23, 2014 from 8:30 AM to 4:00 PM at the McLean Hilton in McLean, VA.

This year's APMP Capture and Business Development Conference is designed for capture, BD and proposal executives to better connect with their government counterparts in federal agencies to learn invaluable proposal submission strategies directly from the agencies receiving your work. It also offers high-level Capture and BD education, information mindshare, and superior networking to help your team learn strategies that will deliver more wins.

Topics covered at this executive-paced, one-day, federally focused conference include:

- Competitive and market intelligence and how to better sync your proposal to the needs of the agency.
- Results of an extensive APMP Procurement survey that will reveal for the first time, eye-opening win strategies and statistics.
- Boardroom-like discussion on government procurement and acquisition issues that you face daily.
- Introspective thought about how BD affects your organization's bottom line.
- An executive-level brainstorming workshop, to better prepare you for the win.
- Review your federal BD strategies, listen and meet with agency staff you want to connect with. Attend this conference, so you can determine how your team is contributing to the best capture, BD and proposal strategies.

Last year's conferences had 146 attendees.

"This is the best APMP conference I have attended in 18 years."
—David Sotolongo, Vice President Program Development Office of RTI International in North Carolina

Register today because you understand the importance of this event, the presenters you'll hear, and the connections you'll make.

Come back to this page often, to see updates on the speakers who will participate in the Second Annual APMP Capture and Business Development Conference.

Questions

For information on event registration please contact Lauren Williams, APMP Membership and Chapters Coordinator at lauren.williams@apmp.org.

For information on presenting at or sponsoring this event, please contact Patrice Scheyer, APMP Director of Marketing and Communications, at Patrice.scheyer@apmp.org.

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

Jessica Douglass
Intelligent Decisions, Inc.
ezine@apmpnca.org

Editors

Constance Dyson, MBA, CF 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, CF APMP
24 Hour Company
megan.skuller@24hrco.com
703-533-7209

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

Circulation

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

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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.

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