GOVERNMENT & COMMERCIAL PROPOSALS

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PROPOSAL TIPS, TRICKS, & SECRETS

NCA APMP NATIONAL CAPITAL AREA

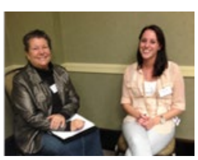
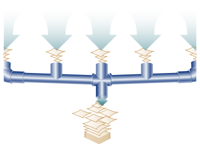
# EXECUTIVE summary

**Winter 2014** | Volume 21, Issue 1

This Issue's Theme: **Your Pipeline – The Key To Your Success**

**Inside:**



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

President's Corner

# The APMP-NCA Pipeline and You – A Foundation For Chapter Success

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


Before we talk about pipelines, a really big THANK YOU goes out from the chapter to our departing Board Members.

**Olessia Smotrova-Taylor, APMP Fellow,** has served on the NCA Board of Directors for 6 years. She served as the Chapter President in 2012 and 2013, and as the eZine Chair in 2008-2011. Olessia pioneered the use of social media and webinars. She created new board positions. She turned the Executive Summary newsletter into a full-blown eZine that was part of winning APMP's 2010 and 2013 Communications Awards. Her ideas and initiatives have brought the NCA chapter to a new level of excellence as one of the world's largest APMP chapter, and have positioned us for success in 2014.

**Julia Pochekueva, CF APMP, MBA,** has served on the NCA Board of Directors for two years, 2012 – 2013, as the eZine Chair. Under Julia's detail oriented and milestone driven leadership, the NCA newsletter process and format were enhanced to provide an improved workflow and better end product. The eZine was a key element in NCA's receipt of the 2012 Communications Award from the APMP International.

**Bridget Skelly** was the Chapter's first Marketing and Publicity Chair, serving in 2013. Bridget initiated an upgrade of the APMP-NCA website, which is scheduled for release in early 2014.

**Michelle Sullivan** served as the Event Logistics Chair in 2012 and 2013. In this time consuming and extremely important role, Michelle arranged the venues for all chapter activities, handled registration, and manned the registration table at each event. Michelle quickly eliminated our legacy Excel spreadsheet registration system and brought the RegOnline registration tool into the process, significantly improving our registration interface and the management of registration data.

A huge thank you to the legacy and pipeline opportunities these leaders have left to the new Board of Directors and the NCA Chapter. The following are a few things the NCA Chapter accomplished in 2013.

## APMP-NCA Highlights of 2013

- NCA held six Speaker Series events, including two breakfasts and four dinners.
- Co-hosted a 2-day Mid-Atlantic Proposal Conference & Expo with the Chesapeake Chapter, where 46 respected industry subject matter experts delivered 33 training seminars, 18 professionals took a Foundation level certification class, 12 attended a Practitioner level certification class, and 12 attended a BD-CMM V2.0 Workshop. Approximately 150 individuals attended each day of the conference.

- A webinar titled "Doing More with Less… and Winning More!" was hosted by corporate partner, Lohfeld Consulting Group, with 200 attendees.
- NCA introduced a Mentoring Program, enabling individuals to receive guidance from a mentor to advance their career and achieve certification goals.
- The Chapter created a new Board of Directors position – Mentorship/Professional Development Chair.
- The APMP-NCA LinkedIn Group had more than 1200 1300 members.
- We co-chaired a breakfast event with the Chesapeake Chapter called "The Good, the Bad and the Ugly of IDIQ Contracting".
- NCA introduced the 5-Fact Friday email, which provided highlights of what was going on in the chapter.
- NCA initiated a revamp of our IT infrastructure, including the NCA website and membership database.
- NCA had 17 Corporate Partners who introduced members to top-notch talent, and shared with us their skills, offerings, tools, and resources.
- NCA gave away free attendance for our events, and a free registration for the 2014 APMP International Bid and Proposal Con.

In total, NCA offered its members 83 topics presented by 112 industry experts in 2013.

In October, the NCA Chapter members elected a new Board of Directors.

## Your 2014 Board of Directors:

**President**
Maryann Lesnick, CP APMP, PMP, MOS

**Vice President**
Lisa Pafe, CPP APMP, PMP

**Treasurer**
Eric Schwarz, CF APMP

**Secretary**
Constance Dyson, CF APMP, MBA

**Annual Events Chair**
Shanelle Noss

**Corporate Partner Chair**
Andrea Tasker

**Event Logistics Chair**
Alex Brown, CF APMP

**Alliances and Special Events Chair**
Ros Angus

**Speaker Series Chair**
Russell Smith

**eZine Chair**
Jessica Douglass

**Marketing and Publicity Chair**
Ben Skelly

**Membership Chair**
Jay Carroll, CP APMP

**Technology Chair**
Tom Skrobacz, CF APMP

**Mentorship/Professional Development Chair**
Alexis Dimouro, CPP APMP

## That brings us to today and a look at our pipeline for the future.

APMP's mission is to advance the arts, sciences, and technology of new business acquisition and to promote the professionalism of those engaged in those pursuits. Our Board of Directors positions are each associated with a chapter committee, with the BOD member serving as chair. These committees represent key areas of chapter operations and programs. The work of these committees, in collaboration with the BOD, sets the agenda for the chapter each year – the chapter's "Pipeline." The pipeline for 2014 will include such things as:

1. A 2-day Mid-Atlantic Proposal Conference and Expo
2. Quarterly Speaker Series events – 3 dinners, and 1 breakfast
3. A quarterly eZine
4. A new website and membership database
5. An improved, robust and searchable Body of Knowledge
6. Improved event registration process and tools
7. Expanded education programs
8. The first class of our Mentorship Program
9. Networking events
10. Coordination and co-sponsored activities with other chapters and APMP International

As BD professionals, we understand that just having a pipeline is not enough. NCA must assign resources to pursue each opportunity in the pipeline. NCA needs volunteers. We need your help defining and planning chapter programs and events. We need your ideas. We need your energy and enthusiasm. We need YOU!

People volunteer for many reasons. Some of these include:

- to feel needed
- to share a skill
- to get to know a community
- to gain leadership skills
- to receive recognition
- to have an impact
- to learn something new
- to become an "insider"
- to be challenged
- to feel proud
- to make new friends
- to explore a career
- to do something different from your job
- to have fun!
- to have an excuse to do what you love
- to make a difference
- to be part of a team
- to build your resume
- to be an agent of change
- because you were asked

Well, you have been asked!! Please consider joining a committee or volunteering to help where help is needed. We need a chairperson for the Annual Conference. We need volunteers at the registration table for each event. We need help with membership, with publicity, and with the corporate partner programs. We need writers for the quarterly eZine. We need editors. We need volunteers to bring our pipeline to closure. We need YOU.

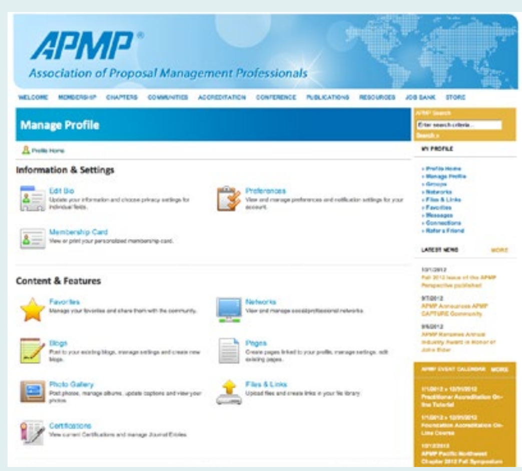
Being an active member of the NCA chapter is a sure way to get value from your membership. It also earns you CEUs.

The 2014 Board of Directors will be holding a strategy session on January 25th to formalize priorities and strategies for the year. We will finalize our "Pipeline" of target opportunities and activities at that meeting. Look for more information about volunteering opportunities at that time. Help us turn our pipeline of opportunities into success stories!!

President, Maryann Lesnick, CP APMP – 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.

# 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.



# Meet the New 2014 Board of Directors

## In October, the NCA Chapter members elected a new Board of Directors. Here are some brief bios of your new Board:

**President, Maryann Lesnick, CP APMP—**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.

**Vice President, Lisa Pafe, CPP APMP—**Lisa is Principal Consultant, Lohfeld Consulting Group - PMP and ISO 9001:2008 Internal Auditor. She has served as the APMP-NCA Board of Directors Speaker Series Chair for the past two years and Committee Member several years prior.

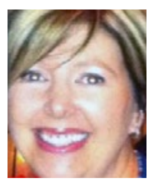
**Treasurer, Eric Schwartz, CF APMP—**Since 2004, Eric has been senior bid & proposal manager for Information Builders' Federal Systems Group. An active member of APMP since September 2007, he has served on the NCA board since April 2008 and as Treasurer since January 2009.

**Secretary, Constance Dyson, CF APMP, MBA—**A Proposal Manager for Leidos in Reston, VA, Constance has been an active member of APMP-NCA since 2010, Secretary in 2013, Boot Camp Committee 2011 and 2012, and E-zine editor for 3 years. Constance introduced the Mentorship Program as a key member benefit in 2013.

**Annual Events Chair, Shanelle Noss—** Shanelle Noss is a Proposal Coordinator at Veterans Enterprise Technology Solutions (VETS), Inc. She is an active member of the NCA Chapter and is currently involved as a protégé in the chapters Mentor Accreditation Program.

**Corporate Partner Program Chair, Andrea Tasker—**Andrea is responsible for business development at ENEXDI. She has been a member of the APMP-NCA chapter since 2011, active on the annual event planning committees, and Corporate Partner Chair for the past two years.

**Event Logistics Chair, Alex Brown, CF APMP—**Alex is Director of Operations at A2L Consulting. Alex has been on the Board of Directors for APMP-NCA since 2008. His Chair positions included logistics, ombudsman, marketing and annual events, most recently as the Annual Event Chair.



**Alliances and Special Events Chair, Ros Angus—**

Ros is Director Business Development with Proposal Development Consultants, LLC. She served on several Boot Camp committees, and currently serves as Networking Chair, organizing a variety of events targeted to different membership segments.

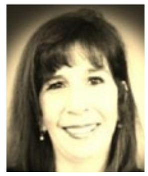
**Speaker Series Chair, Russell Smith, CP APMP—**Russell has been an active member of APMP since 1994. He served on the Board from 2000 thru 2004. During that time, he completed one term as Program committee lead and one term as President of the NCA chapter.

**Marketing & Publicity Chair, Ben Skelly—**Ben is Operations Director at Bridged Design. He served on the 2013 NCA Marketing & Publicity sub-committee, with responsibility for website updates, social media marketing, email blasts, and champion of the "5 Fact Friday" campaign.

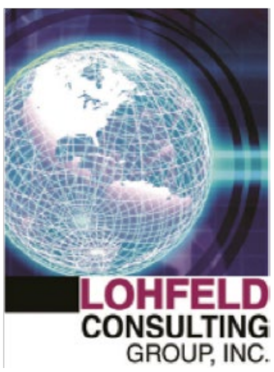
**Membership Chair, Jay Carroll, CF APMP—**Jay is a Proposal Development Senior Manager, Intelligence and Classified Proposals for CACI, Inc. He is the current Membership Committee Chair. He has been a speaker for the NCA Speaker Series, the APMP Bid & Proposal Conference and other industry events.

**eZine Chair, Jessica Douglass—**Jessica is a Proposal Manager at Intelligent Decisions and an active member of the NCA Chapter. Her background includes operations and management, customer service, communications, and graphic design. Her highly energetic personality ensures continued success of the eZine publication.

**Technology Chair, Tom Skrobacz, CF APMP—**Tom has been a member of APMP since 2008. He has an extensive business development and technology background, and will be a key player in launching NCA's new website and maintaining our technology capabilities at a level that supports the chapter's mission.



**Mentorship/Professional Development Chair, Alexis Dimouro, CPP APMP—**In 2013, Alexis served on NCA Board of Directors as the eZine chair, committee member of the NCA Speaker Series Planning Committee, and as a mentor for the APMP Accreditation Program.




Insights Blog

## APMP-NCA Mentorship Program – A Chance To Pay It Forward

December 4 was a great milestone in APMP-NCA history—our chapter kicked off a new mentorship program to pair experienced capture and proposal professionals with less-experienced protégés. Lohfeld Consulting Group Principal Consultants Lisa Pafe and Kristin Pennypacker volunteered to serve as mentors to two novice proposal coordinators who are employees of our customers—Veterans Enterprise Technology Solutions, Inc. (VETS) and Ace Info Solutions, Inc. (AceInfo).

The 9-month program pairs 12 mentors with 12 up-and-coming proposal professionals to help them prepare for APMP certification, share lessons learned, work together on particular areas of interest, learn more about all that our Chapter offers members, and network with other APMP-NCA members.

Paired mentors and protégés will keep a log of achievements and report to the program bi-monthly. Each mentor earns CEUs and receives a stipend of $200 to spend on educational materials, professional events, shared meals, and other expenses. Protégés additionally benefit from 4–8 hours per month of mentor guidance and 50% discount on all APMP-NCA events.

"This is a great opportunity to grow as a proposal management professional and learn from the best," stated Sareesh Rawat, AceInfo Proposal Coordinator and protégé to mentor Lisa Pafe. His goal is to earn APMP Foundations certification at the conclusion of the program in September.

"I want to pay it forward," Lisa Pafe responded. "I benefited from mentorship early in my career, and this program gives me the chance to help a talented professional succeed."

Look for more posts from Lohfeld Consulting Group mentors and protégés as the program progresses!

Get more insights from the Lohfeld Consulting Group team every month – click here to subscribe to our Capture and Proposal Tips eZine

Ask the Graphics Guru

# 5 Silver Bullet Factors That Win Proposals

by Mike Parkinson, PPF.APMP

Is there one silver bullet that wins proposals? Yes and no. Trust is the closest factor I have found to being *the* silver bullet that wins proposals. Our customer must trust that we can deliver the solution at the agreed-to price with little to no issues. (Do you make it a habit of buying from people or companies you do not trust?)

**No trust, no win.**

Definitively, there is no one silver bullet factor that guarantees a win. There is no one thing that *always* works; nor is there one thing that offsets a sea of negative influencers (e.g., bad reputation, noncompliant or poorly executed proposal, lack of customer insight). However, there are five silver bullet factors that greatly impact the likelihood of a win, and these factors require customer trust for them to prevail.

These five silver bullet factors historically tip the scales in favor of one solution provider over another. Which factor(s) to use varies according to circumstances. The five silver bullet factors can be cumulative and are relative. They are relative to one another and relative to other factors. In other words, relative to all other aspects of proposal development, one could call these silver bullets because of the historic weighting of these five variables. The following is a list of those factors:

## 1. Price

The right price can win a proposal. Especially, when the customer is focused on price (for whatever reason). For example, if the customer is downsizing and needs to buy your solution, there may be great pressure to spend less money. A low, *realistic* price is paramount. Signs that price is a silver bullet factor should be evident based on customer insight and RFP language and type (e.g., LPTA, a heavy weighting toward price in government RFPs and a high quantity of price-centric terms in the commercial RFP). Commoditized solutions are often purchased based on price.

Selecting the winning price requires insight and discipline, and it must be proven possible. If the customer does not *trust* that the solution provider can deliver the solution to their satisfaction at the listed to price, that solution provider will not win.

## 2. Sales or Capture

Most proposals are won before the RFP is released. Cultivating a strong relationship with your future customer is key. The more you know your customer (and the more they know you), the better your chances of success. It is common that white paper content supplied by a solution provider can be found in an RFP, which favors of the solution provider that supplied the white paper. The proposal is theirs to lose.

Learn all you can about your future customer. What are their hopes, fears, and biases? If possible, meet with them. Establish a relationship. Build *trust*. Help your future customer connect your solution with their problem. Make it easy for them to favor your solution by providing (easy to copy and paste) softcopy content that differentiates your solution from your competition (e.g., whitepapers, specifications).

## 3. Reputation

Buyers and decision makers are risk adverse. They fear making the wrong choice. There is a saying, "No one was fired for hiring (insert well-known company here)." If there are three companies vying for one contract and two are unknown, the known company usually wins. It is safer. It is a *trusted* solution provider.

Solution provider reputation is often established over time and independently of a single proposal contract. Popularity, branding, marketing, and word-of-mouth are keys to building a strong reputation.

Unknown companies can leverage this approach. Use testimonials and past performance to allay fears (see "Proof").

Everyone claims to be capable—perhaps, superior—but very few prove it. Who says you are the best besides you?

## 4. Professionalism

Perceived professionalism, based upon the quality of the proposal, intrinsically transfers to the solution and the solution provider. All content the decision makers receive must support our professionalism to build *trust*.

In a recent large government RFP, the first **bolded** paragraph under the "Instructions to Offerors" reads

> "Offerors are cautioned that the Government considers the overall form and substance of their proposal to represent the general quality of work expected to be performed under this contract. Accordingly, it will be considered throughout the review and scoring/evaluation process."[1]

Although common knowledge among proposal professionals, this is one of the few times this factor has been formally stated in a government RFP.

An evaluator in an international commercial bid told me that the winning proposal was so well done (i.e., aesthetically superior, easier to read and evaluate, used quality materials, was of a better print quality, and was customer-focused) that the evaluators considered not reviewing the other proposals. He said that it was obvious who wanted it more, was more dedicated, and who was going to deliver a better solution. Below are two proposal pages from the same solution provider. Which do you think will be seen as more professional by an evaluator—A or B?

***Content isn't king, contrast is.***



[1] Bid referenced FAA AIMM (DTFAWA-13-R-00020), Section L.6.0.

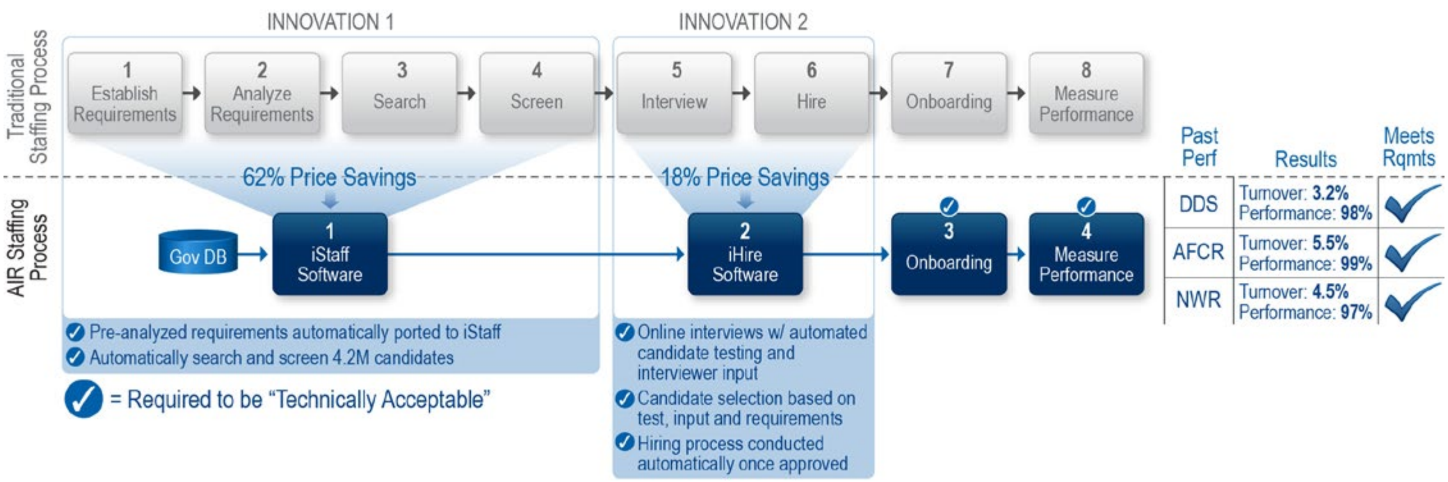
To make your proposal standout, use experienced proposal professionals, writers, designers, editors, desktop publishers, and printers. The quality of your document from cover to cover informs your customer's perception of your professionalism and abilities. (Relativism is significant. If all proposals are professional, then none stand out. Other factors become more important.)

### 5. Proof

Many proposals make unsubstantiated claims hidden behind jargon. Measured, quantified proof such as past performance and metrics validates claims and reassures buyers. Our customer believes (*trusts*) our claims. Use graphics, callout boxes, and highlighting to draw attention to proof points. For example, the below graphic helps prove how the price is 80% lower and provides past performance metrics.

These five silver bullet factors have one thing in common. They must resonate with the customer and build *trust*. For example, if the price is too low based upon customer expectations then the customer may not *trust* that you understand the complexity of the problem. Customer insight and an understanding of the problem are paramount to building *trust*. For this reason, some factors may trump others (e.g., reputation may trump price in some situations).

Know your customer. Decide what silver bullet factor(s) will work best and apply them. Measure your success and improve. This approach works well for me and it will for you.



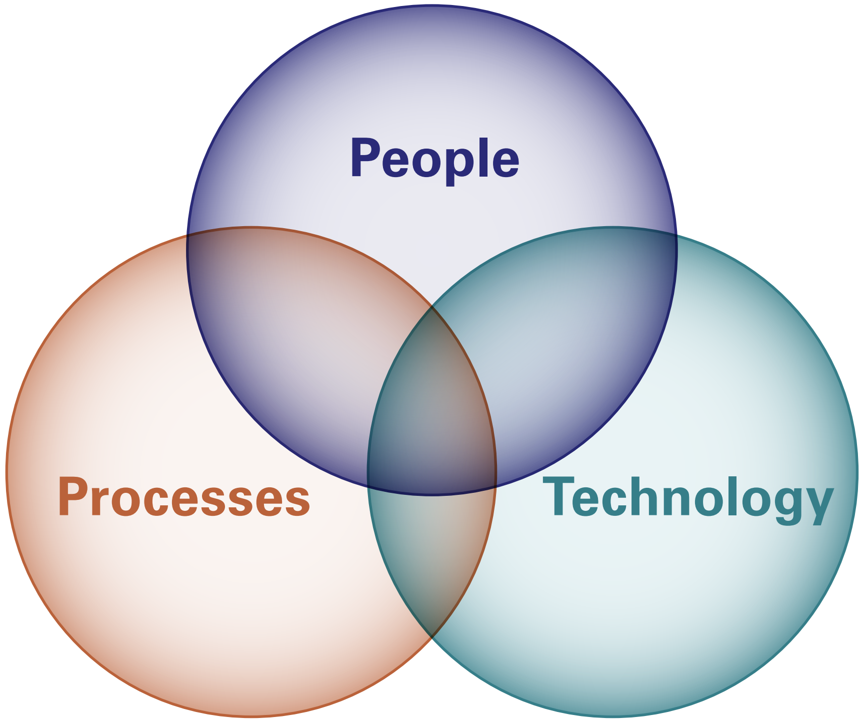

Mike Parkinson, CPP APMP Fellow, is an internationally recognized visual communications guru and proposal expert, professional trainer, and award-winning author. He is a partner and head of marketing at 24 Hour Company (24hrco.com) specializing in bid-winning proposal graphics. His Billion Dollar Graphics 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.

## Fun Fact...

Benjamin Franklin wasn't trusted to write the Declaration of Independence because it was feared he would put a joke in it....

# Capture and Proposal Innovations

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




I am pleased to introduce a new column focused on capture and proposal innovations – people, processes and technology. With the uncertainties and cost cutting we weathered in 2013, the 2014 market demands contractors increase competitiveness. According to Deltek GovWin, Federal government contract spending has declined by $35 billion over the past three years, which amounts to a 6% drop in contract spending. In the most recent annual Grant Thornton contractor survey, 60% of respondents reported either no profit or profit in the 1–5% range. Meanwhile, Bloomberg Government reports that the trend towards multiple award vehicles decreases revenues for firms previously dependent on single award deals while simultaneously increasing Bid and Proposal (B&P) costs.

An effective way to stop wasting money in a tight market is to increase B&P productivity through innovation. This column addresses innovation across the following areas:

**People** – Gone are the days when contractors could afford bloated proposal teams, including high travel costs, three square meals a day plus snacks, and reams of wasted paper. While it may not qualify as an innovation to go lean, our industry has been slow to adopt lean principles such as right sizing. Going lean can be as simple as spending time during the planning stages to assess what types of skills, experience and competencies as well as personalities are needed and when. Compare what you need to the available pool team-wide, and then don't hesitate to play favorites when selecting the team. Identify and segment each person's competencies and keep track of the same in your database. Just as important as the ability to write might be the ability to collaborate and be a team player. As the Capture or Proposal Manager, you need to make honest assessments and tough decisions. You can't afford to waste resources by selecting the wrong capture and proposal personnel. Once you have the players identified, cycle them in and out of the team as needed rather than keeping the entire team booked continuously and risking unproductive down time. Not only will this approach reduce costs, but it will keep the players fresh and focused.

**Processes** – The best of the breed are eliminating wasteful, multi-step processes and tailoring their approach to leaner times. Innovators ask tough questions. Does it really make sense to ask writers to deliver content and reviewers to review only at set points on the calendar? Should we perform competitive analysis only for Black Hat? Are formal one to two day color team reviews truly effective? Innovative companies are borrowing iterative methods from Agile software development. Agile teaches that the longer it takes to find a defect, the more expensive it is to address. Applying the same principle, if we wait until set points on the calendar to perform reviews, recovery will be

Innovative companies are borrowing iterative methods from Agile software development. Agile teaches that the longer it takes to find a defect, the more expensive it is to address.

more difficult. Smart companies use iterative cycles to rapidly respond to change. They receive and review proposal inputs (competitive analysis, proposal content, review comments) in smaller pieces that the Capture and Proposal Manager deliver to the team in real-time (leveraging technology) to provide immediate feedback. In addition, with the rise in multiple award vehicles and task orders with shorter turnaround times, iterative techniques are more important than ever.

**Technology** – Enterprise proposal management software is becoming increasingly popular and is proven especially effective for managing and communicating with geographically dispersed and leaner teams. We are all familiar with products that help store, control, revise, distribute, review, and publish proposals through centralized libraries, calendars, search capabilities and proposal working sites. Innovations include the trend towards systems that support and enforce specific company capture and proposal processes, automated work flows, and reporting while at the same time integrating, leveraging and analyzing pipeline information from industry research groups and social media inputs from LinkedIn, Twitter, Facebook, and more. These integrated enterprise wide offerings require some upfront investment to define requirements and tailor the COTS offering. However, in the long run, enterprise systems save money, increase collaboration and knowledge transfer, and support continual improvement. The trend towards the cloud and Software as a Service (SaaS) further introduces efficiencies, especially for companies with less mature IT infrastructures.

What innovations will enhance our field in the year(s) ahead? Send me your ideas for future columns at lpafe@lohfeldconsulting.com.

Lisa Pafe is a 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 a CPP 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 the Vice President.

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.

## 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-NCA Mentorship Program

by Alexis Dimouro CPP APMP

In December APMP-NCA officially kicked off an exciting new Mentorship Program with it's inaugural a Meet and Greet event! The 9-month program paired seasoned Proposal and Capture mentors with less experienced up-and-coming proposal professionals to help them prepare for APMP certification, share lessons learned, work together on particular areas of interest, learn more about all that our Chapter offers members, and network with other APMP-NCA members.

The pairs will meet in person over the phone and or via WebEx to work on their individual development goals. Mentor, Deborah Brooks and Protégé, Shanelle Noss began their development by undergoing a study session on personality types called Wired That Way based on the teaching of Marita Littauer & Florence Littauer. At the Mentor and Protégé Meet-and-Greet night, Shanelle made a professional goal request to improve her oral communications with her colleges and other professionals. Deborah had previously studied personalities, and experienced first-hand, the benefits it had on her communication and affecting her relationships across the board. Shanelle is eagerly identifying her personality profile to gain a better understanding of her natural strengths and weaknesses and use them to more effectively communicate with others. Shanelle writes; "We all have our own personalities; character traits, natural behaviors, temperaments. We've all noticed throughout life that there are certain individuals we really get along with, and others we clash with. Understanding your own personality, as well as being able to identify other peoples tendencies is useful in, not only attaining personal growth, but allowing you to vastly improve your relationship with others - both professionally and personally. In the process of discovering your identity, you can use a gained understanding of personality traits to overcome your weaknesses and even make a conscious effort to acquire other strengths that don't come naturally to you. While you can't change people, when applying this knowledge, you can change the way you approach others by speaking to their personality language. Knowing how to communicate to someone's personality type makes all the difference in your ability to get along them. Whether you would like to improve your relationships with customers, colleagues, companions or your children, apply an understanding of personalities and enjoy living in your strengths!"

Our next sponsored event will be March 6th at the Westin in Tysons Corner, where the group will have the opportunity to network and share their experiences! Send us your success stories to mentorship@apmpnca.org so they can be shared with our chapter!

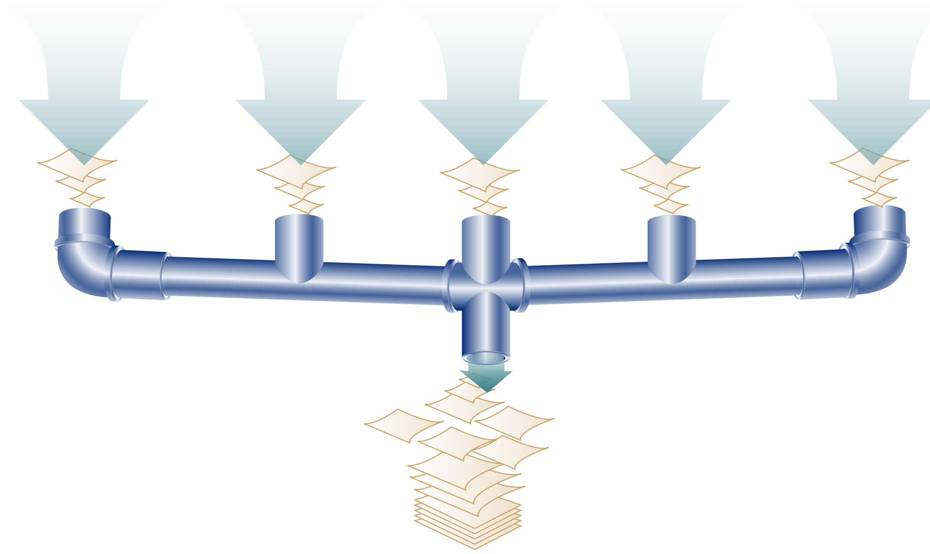
Alexis is an Accredited Professional Member, Association of Proposal Management Professionals (CPP APMP) with more than 20 years of experience in proposal management, proposal writing, process improvement, and capture management. She currently serves on APMP National Capitol Area (NCA) Chapter Board of Directors as Chairman of the Professional Development Committee, a member of the NCA Speaker Series Planning Committee, and as a mentor for the APMP Accreditation Program.

Legal Corner

# Competitive Intelligence – Know Thy Enemy

by Shlomo D. Katz, Counsel, Brown Rudnick LLP

## *The Valves on Your Pipeline*



It's always nice to know where your next meal is coming from. For some small businesses, this may mean long term alliances with larger Government contractors who, for their own self-interested reasons, subcontract repeatedly to the same smaller companies.

What could be wrong with that? Often--nothing. Even so, there are pitfalls to watch out for.

When a large company competes under full-and-open competition and includes small businesses on its team, it could be win-win for everyone. The Government and the prime contractor make progress toward their small business goals, while the subcontractor gets needed work. In addition to the experience and revenue, the small business may even get some formal or informal mentoring out of the bargain, especially if the relationship is an ongoing one.

Now turn that around so the large business is the subcontractor to the small business in a procurement set aside for small businesses. Those facts alone are not a problem. But, when the large and small contractors team repeatedly in a formal alliance, or even without a formal agreement to do so, the small business may leave itself open to charges of being ***unduly reliant*** on the large business. Even if both members of the alliance are small businesses, the long-term partnering can create affiliation under the ***continuing contractual relationship*** and or the ***identity of interest*** rule. That could mean ineligibility to win set aside contracts.

***Here's why.***

Contracts set aside for small businesses are supposed to be awarded to and, for the most part, performed by small businesses. The regulations of the U.S. Small Business Administration ("SBA") in Title 13 of the Code of Federal Regulations, Part 121 and elsewhere, define when a company does or does not qualify as a small business or certain type of small business, for example, 8(a) or veteran-owned. Competitors can file protests when they believe a set-aside contract was awarded to a company that does not qualify, and the SBA will investigate aggressively.

One of the key concepts in SBA's rules is "affiliation," i.e., the idea that an apparently small business will lose that status if it is affiliated with another entity and the two of them combined exceed the applicable size standard.

To take a straightforward example, imagine that Mr. and Mrs. Crown own 100% of the shares in Jack & Jill Company, which wants to bid on a contract to build a pipeline from the well at the top of the hill to a nearby army base. The contract is set aside for companies with fewer than 500 employees and Jack & Jill Company has only 300 employees. So far, so good.

But, a competitor discovers that Mr. and Mrs. Crown also own 100% of the shares in another company that has 350 employees, so that the two

Even if both members of the alliance are small businesses, the long-term partnering can create affiliation under the *continuing contractual relationship* and or the *identity of interest* rule. That could mean ineligibility to win set aside contracts.

companies combined have more than 500 employees. Would it be fair for Mr. and Mrs. Crown to benefit from a procurement program intended to help businesses with fewer than 500 employees? No, say SBA's rules. The two companies owned by Mr. and Mrs. Crown are "affiliated" for purpose of this procurement and neither of them is considered to have fewer than 500 employees.

The scenarios can get complicated. The important thing for our purpose is that "affiliation" can also be found if a small business is unduly reliant on a large business or if two companies are so closely intertwined that it is only fair to treat them as one company. That could mean that the small business may be ineligible for that set-aside contract. The idea is that set-aside contracts should go to real small businesses, not to companies that are fronts for large businesses.

For example, the SBA Office of Hearings and Appeals ("OHA") found two companies, Arviso and Okland, to be affiliated, and therefore ineligible for award, where—

*"for over 15 years Arviso has been partnered with Okland in AOJV. This has been a long-term relationship, producing in recent years over 40% of Arviso's revenue. This longstanding relationship renders Arviso dependent upon this relationship with Okland for a substantial portion of its income, no business could tolerate the jeopardization of 44% of its revenue. Arviso's dependence on AOJV for such a large proportion of its income makes Arviso dependent on this joint venture with Okland. This dependence gives rise to affiliation on the basis of a continuing contractual relationship. 13 C.F.R. § 121.103(a)(2). Further, Arviso and Okland now have an identity of interest in their long-term partnership in AOJV."*[1]

Does this mean that companies should not use long-term relationships to feed their pipeline. That's not the message. Indeed, SBA's OHA has emphasized: *"Enduring business relationships, which can be critical to a concern's success, are not sufficient to deem businesses affiliated; rather, it is whether those long-term ties create undue reliance and influence amounting to control."*[2] Relevant questions will include, among other things, whether the company claiming to be small has expertise to perform the primary and vital requirements of the contract, whether one company in fact controls the other, or whether one is economically dependent on the other.

In short, it's not illegal for a small business prime to sub to a large business on a set-aside contract, nor is it illegal for two companies to pursue multiple contracts together. But, make you're your pipeline has the valves to keep the wrong types of opportunities from entering.

[1] David Boland, Inc., SBA No. SIZ-4965 (2008)

[2] Maywood Closure Company, LLC et al., SBA No. SIZ-5499 (2013).

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...

There is a subway ticket machine in Moscow that accepts 30 squats as its payment.....

## APMP-NCA Platinum Sponsor Interactive Webinar:

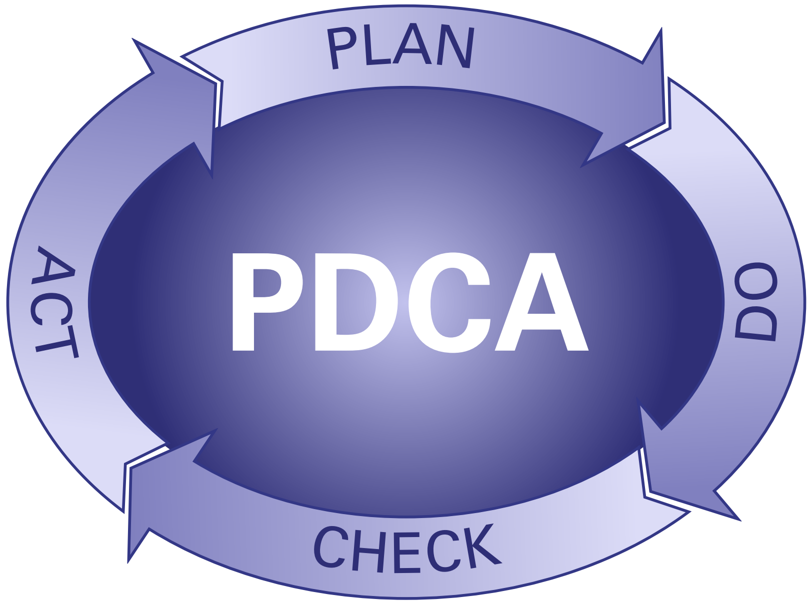
# Doing More with Less – And Winning More!

by Lisa Pafe CPP APMP, APMP-NCA Vice President

The typical company spends on average 10% of their revenue target on Bids and Proposals (B&P). Risks that increase the B&P budget include poor bid decisions, an immature solution, insufficient training and tools, large review teams producing comments that are not actionable, and lack of executive support. With constrained budgets and increased competition for smaller work share, contractors cannot afford to waste B&P dollars. APMP-NCA Platinum Sponsor Lohfeld Consulting Group's Principal Consultants Brenda Crist, CPF APMP, and Lisa Pafe, CPP APMP, presented an interactive webinar on November 20 to 157 participants to highlight how to increase productivity and win rates.

Live audience polling showed that 37% of webinar participants always establish and enforce B&P budgets, 32% sometimes do, and 31% never do. With these statistics in mind, it is especially important to understand how estimate the budget and how to manage it for maximum productivity, defined as greater number of B&P activities that are of high quality to result in more wins.

Brenda and Lisa recommended borrowing from best practices such as ISO, ITIL, CMMI, PMI PMBOK and Agile which all have in common the Plan, Do, Check, Act (PDCA) cycle. Establishing SOPs based on best practices provides a foundation in an environment of rapid change. Best practices serve as a springboard to tailor your solution to customer needs and hone your discriminators.




Interestingly, audience live polling showed that 26% of companies always apply best practices to increase productivity, 68% sometimes do, and 6% never do. Brenda and Lisa provided tips for pre-RFP, post-RFP, and post submission productivity enhancements.

### Pre-RFP:

1. **Pipeline Development** – Make informed decisions at the earliest phase to have the biggest impact on cost savings.
2. **Capture Management** – Avoid incomplete capture; poor capture pushes costs into the proposal phase resulting in much higher B&P costs.
3. **Teaming Partner Identification** – Pre-qualify reliable partners - costs rise when teaming partners are in flux.
4. **Competitive Intelligence** – Focus competitive intelligence on Research, Analysis, and Action.
5. **Database Development** (Resumes/Past Performance) – Leverage existing boilerplate, resumes, company factoids, and past performance as one of the easiest ways to reduce proposal costs.
6. **Training & Tools** – Make a business case for training and tools to increase productivity (and try to use G&A not B&P budget).

### Post-RFP:

1. **Proposal Management** – Use Agile, iterative cycles to provide continuous feedback and communication. Manage pricing

development and review just as rigorously as the technical approach.

2. **Data Calls** – Create a comprehensive data call template and progress tracking sheet easily tailored to each solicitation.

3. **Writing & Editing** – Define the solution fully before writing; provide a detailed outline, writing template, conventions and style guide.

4. **Proposal Reviews** – Right size the team; issue clear instructions; score from the government evaluator perspective.

5. **Production** – Implement reusable templates easily tailored; enforce scheduled time for production, QA and white glove to avoid last minute errors.

6. **Teaming Partner Management** – Set proposal participation expectations in teaming agreement and enforce them.

### Post-Submission:

1. **Customer Debrief** – Win or lose, make it part of the lessons learned and Continuous Process Improvement (CPI) cycle.

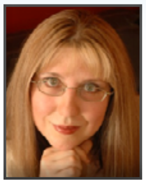
2. **Lessons Learned** – Create a feedback loop that includes root cause analysis to avoid repeating the same mistakes and expecting different results.


3. **Continual Process Improvement** – Share more, not less; change before you have to!

The final interactive poll asked the audience which factors have the biggest impact on B&P costs and must therefore be managed to increase productivity. 24% of participants selected improved opportunity reviews, 52% better capture planning, 4% streamlined proposal planning, 10% better proposal execution, and 9% CPI.

The Lohfeld Consulting Team concluded with some final thoughts. The first reaction to tough times by many companies is to make cuts. We have all seen the downsizing at various companies, often starting with business development, capture and proposals. While understandable to bottom-line focused management, this approach will not help retain market share. Contractors must focus on increasing productivity. As webinar polling showed, opportunity qualification and better capture have the biggest impact on cost savings; poor bid decisions and incomplete capture have the potential to inflate B&P costs many times over through multiple re-writes. Best practices increase productivity, reduce errors and non-compliance, and improve competitiveness and win rates.

Click here for a copy of the webinar.



# BD is Not Drinks, Golf, and Dinners. It is Goals, Customers, and Pipeline

by Olessia Smotrova-Taylor, CF.APMP

A great business developer is a "people" person who builds and sustains long-term relationships with customers and partners, finds opportunities, and closes deals. This naturally requires legwork and face time with people, sometimes translating into drinks, golf, and dinners. Unfortunately, some business developers equate business development with hanging out at social events with friends high up in the government, fine dining, and exclusive golf courses. They call it "opening doors." They say BD takes time. And while it is true, it is easy to mistake movement for progress, and lose sight of the goals.

Some business developers believe that their old relationships will carry them all the way to winning numerous contracts, and inevitably, there will be a pot of gold at the end of the rainbow. In reality, there is much more a business developer can do, apart from maintaining contact with old pals. The best business developers don't just count on their existing relationships for success. There are other approaches that, when combined with great face-to-face time, make them exponentially more effective at business development.

**1. Set goals with your BD personnel** and determine how many opportunities you should have in the pipeline to stay constantly busy. What are some of the key pursuits in your pipeline you have to win in order to achieve your goals?

Your first step is to determine a reasonable goal for your bookings by the end of the year. Bookings are money from your wins that are expected to be received from your customers based on signed contracts. Then, you need to determine how many bids you are going to submit in order to reach that goal. Simply take your end of the year bookings goal, and divide it by your win rate.

Let us say you hope to make $20 million in bookings. Using an industry average 33% win rate, you will find that you will likely need to bid on roughly $60 million worth of bids. This way, when you only win a third of them, you will still hit your $20 million mark. Your next step is to determine how many proposals you have to write in order to reach $60 million. For example, would you rather bid on three RFPs worth $20 million, hoping to win one, or would you rather bid on six RFPs worth around $10 million each, hoping to win two.

Once you come up with an answer, you may want to look at your pipeline of opportunities and see if you can identify the bids that will make up your $60 million in the timeframe that you have identified—or assign an action item to aggressively hunt

Let us say you hope to make $20 million in bookings. Using an industry average 33% win rate, you will find that you will likely need to bid on roughly $60 million worth of bids.

for these opportunities and identify them within weeks of your strategic planning session (otherwise it will be too late).

In all your planning, you will have to take into consideration that there is a lag time for government awards. Some of them can be made within 1-3 months, especially as task orders on MACs. Others may take up to a year or two to award.

The idea is to have at least one proposal to bid on every month, and depending on your size, you should submit two or three to ensure continued growth.

**2. Build trusted advisor relationships with your customers.** Your first task is to create a contact plan using phone calls, visits, and, to a lesser degree (and very cautiously), e-mails. You need to build as many relationships as possible, with as many contacts at the agency as you could possibly find time to get acquainted with.

The reason you need to go wide and not only deep is that your main government contact could up and leave after you've invested all your time and efforts into building that one relationship. For example, in DOD people frequently get reassigned after only a couple of years in the office. Therefore, you want to ensure that you establish a larger footprint at the agency.

To position yourself as a trusted advisor, learn through your interaction with the customer about his or her pressures, key care-abouts, hot button issues, and needs. You will have to practice your active listening skills. Use this information as an opportunity to serve and offer your customers help. They might need you to guide them in preparing the statement of work, or learn about state-of-the-art technology, or explore different options to solve challenging problems on their projects.

**3. Build a robust pipeline of opportunities.** Without a great pipeline, your growth will be entirely dependent on luck, and will be disorganized and unpredictable. Your pipeline can take a form of an Excel spreadsheet, or some other well-known solution such as Salesforce. A key to a great pipeline is to use a simple but robust tool, dedicated resources for updating the pipeline, and a process for its effective management.

A business developer should use more than relationships and face time with customers to fill the pipeline. Other techniques include monitoring online announcements to jump on new opportunities and learning about opportunities from subscription-based online sources and databases such as GovWin IQ, BGov, and Govini. Find out from your workforce or even other subs working on site together with the customer that they have an issue; meet to develop requirements, and write unsolicited proposals to add scope to your existing contract vehicles. Advertise your GSA schedule and other Indefinite Delivery Vehicles to add scope to them. Scout current projects for opportunities to write unsolicited proposals. Leverage your workforce and teaming partners to find out about new opportunities. Learn through marketing visits about the urgent need for opportunities that do not require a complex procurement process. Find prime contractors who have trouble with staffing their contract, and offer up your staff to fill vacancies. Network at trade shows and other events.

There are no shortcuts to being successful in capture and business development, even with good relationships. Business Development is hard work through relentless research, legwork, adding value to customers over an extended period of time, and systematic approach to managing pursuits. With this type of business development, you are bound to reap high rewards.

Olessia Smotrova-Taylor, CF APMP, is the President/CEO of OST Global Solutions, Inc. (www.ostglobalsolutions.com), a business development, capture, and proposal management company that helps businesses grow in the federal market. She was the President of the APMP-NCA chapter for two years. Her Bid & Proposal Academy teaches courses in capture and proposal management, including Business Development for Project Personnel. She is a speaker and author of How to Get Government Contracts: Have a Slice of the $1 Trillion Pie. She can be reached at 301-384-3350 or otaylor@ostglobalsolutions.com

# November Dinner Panel Predicts Challenging Year Ahead

by Lisa Pafe, CPP APMP, PMP

2014 may not be better for government contractors, but it will be interesting. That was the panel consensus at the APMP NCA's November Dinner event on "A Look Back at 2013 and Forecast for 2014". Four panelists, Elliott B. Branch, Deputy Assistant Secretary of the Navy (Acquisition and Procurement) in the Office of the Assistant Secretary of the Navy (Research, Development and Acquisition); Domenic Cipicchio, Lead Contract Strategist for Deloitte Services LP, Federal Contracts Group; Karl E. Spinnenweber, Vice President & General Manager, URS Mission Readiness Group; and Kevin Plexico, Vice President for Deltek's Federal Information Solutions shared their insights with APMP NCA members over dinner at the Westin Tysons Corner. The panel, expertly moderated by Hilary Fordwich President of Strelmark, LLC, spoke honestly and insightfully about 2013 and offered their predictions for the new year.


Moderator Hillary Fordwich asks our panelists a question; from left to right: Elliott B. Branch, Domenic Cipicchio, Karl E. Spinnenweber, and Kevin Plexico.

Of course, pricing was on everyone's minds. Elliott stated that the Government is looking to obtain every ounce of value out of every contracting dollar. While this focus won't necessarily to all Low Price Technically Acceptable (LPTA) procurements, it does mean that the government will pay a premium only when strategically warranted. Karl stated that URS has moved pricing to the forefront of win strategy. They no longer ask what is the Price to Win (PTW), but instead, what is the lowest price we can afford to bid. Dominic pointed out that by focusing more on LPTA, the Government may lose the ability to benefit from innovation. Kevin stated that we face a unique market due to the magnitude of budget cuts driving lower prices, and therefore customer intimacy is more important than ever.

The changing market is leading to some consolidation as larger companies acquire small to mid-size vendors. However, all panelist agreed that plenty of opportunity still exists for small businesses competing in the set-aside market or seeking subcontractor roles with larger firms. Increased competition is also leading to more bid protests. Elliott pointed out that protest is not a winning strategy as protests tend to make Contracting Officers (COs) less communicative. All agreed that nonetheless, protests will continue because there is little disincentive, especially for incumbents who can gain revenue during the protest period.

Final thoughts? Elliott stated that the uncertain 2014 market will require agility and result in survival of the fittest. Karl recommended that companies right size infrastructure and focus on their strengths. Dominic recommended communicating with the COs as they have gained clout in the process. Kevin suggested that contractors establish a three-legged stool: customers and contract vehicles; investment in areas of strength; and cost-effective enterprise business systems.

The Speaker Series Planning Committee would like to thank our speakers, moderator, and sponsors BrownRudnick, Lohfeld Consulting Group, Proposal Development Consultants, Shipley Associates, and 24 Hour Company who helped make this event a success. We look forward to seeing you at 2014 events.

# January Networking Event Honors Members!

by Russell Smith

On Wednesday January 28, APMP NCA held a free networking event in honor of members at the Tysons Westin. Everyone was pleased to have attendance of about 100, after having to cancel the original date due to weather. Thanks are due the excellent work of Alex Brown on meeting logistics and Ben Skelly for meeting publicity.

This was a stand-up networking event with hors d'oeuvres advertised. Thinking we would be having light fare, the writer made the mistake of eating in advance. However, the food was plentiful and outstanding. It included a large quantity of mini hamburgers, mini crab cakes, skewered oriental chicken sticks, and other delicacies, all Westin quality.

Featured entertainment was provided by the "presidents" from the Washington Nationals baseball team. These costumed mascots represent U.S. presidents George Washington, Thomas Jefferson, Abraham Lincoln, and Theodore Roosevelt. Everyone was surprised to learn that these mascots are nine feet high. They literally would not fit in a normal room. They do not talk. However, there was a lot of hand shaking, high fives, and the famous "run around the bases," in this case around the service tables in the center of the room. As Alexis Dimouro said, "The racing presidents were hilarious!!!" She added, "We caught up with them later when they were normal sized!!!"There was a 15-minute meeting in which the officers presented announcements. It was obvious that the attendees had a good time networking with their friends and new contacts.

We look forward to seeing you at the Wednesday, March 19, dinner event on recompetes. This is an event that every proposal professional will want to attend. The panelists will include Bob Lohfeld the President of Lohfeld Consulting; Kristin Dufrene, CPP APMP Fellow and Vice President of Capture and Proposal Excellence at CACI International, Inc.; and Nigel Thacker, a published specialist on recompetitions from the United Kingdom. The moderator will be Mark Amtower, a popular government contracting consultant and keynote speaker. Given the importance of recompetes to all of us and the outstanding panelists, you will want to put this meeting on your calendar right now, and come early.

Russell Smith has devoted the past 33 years of his professional life to helping customers write contract-winning proposals. For the last 28 years, he has been president of proposal consultant firm Organizational Communications Inc. (OCI) in Reston, Virginia. OCI's position in the market is based on providing lower price then other leading companies and having the largest consultant list in the business. Russell has been an active member of APMP NCA since 1994 and he previously served as president. Prior to founding OCI, he worked for ADTECH and ManTech as well as for two 8(a) companies. OCI supports scholarship programs at the College of William and Mary in in Uganda, and Russell serves on the board of the Children's AIDS Fund. He completed two degrees at the University of Texas and a doctorate at the College of William and Mary.

# Congratulations to APMP-NCA's 1st Scholarship Awardee!!!

Erin McClain has been awarded a scholarship for attendance to the APMP Bid & Proposal Con 2014!! Erin demonstrated a commitment and desire to continue her growth and development as a proposal professional and to pay that forward with other proposal professionals by organizing a Young Proposal Professional Group on MeetUp. Erin has also joined our Professional Development Committee. Erin is very deserving of this award and APMP-NCA is proud to have her in our association!! Look for your opportunity to apply for the 2015 Scholarship later this year!

# APMP-NCA & APMP International Upcoming Events

## March Speaker Series

REGISTER!

### How to Win Your Next Recompete

**March 19, 2014 – 5:30 to 8:30 PM**

Retaining existing work is less expensive than winning new business, making the recompete process a vital business practice. With greater competition, budget constraints, and more protests, it is becoming increasingly difficult for incumbents to win. Besides the cost roadblocks, incumbents are often over-confident about their chances of winning. This complacency often results in the incumbent downplaying performance issues, under-estimating the competition, and failing to develop a competitive price.

As the incumbent contractor, your recompete is a "must win". However, contractors often develop ineffective strategies and succumb to the dreaded "incumbentitis." This interactive panel will include recognized recompete experts who will share valuable insights into how to avoid common pitfalls and develop an effective win strategy. The panel will be moderated by Mark Amtower, Government Market Master and host of the radio show, Amtower Off Center, in its seventh year on Federal News Radio.

**When:** March 19, 2014 – 5:30 to 8:30 PM

**Where:** Westin, Tysons Corner

**Cost:** Members, $75 – Non-Members, $85

(Early Bird Registration: Save $10 by registering by 2/28)

Networking & Cocktails begin at 5:30, followed by your dinner at 6:30, and panel at 7:30. See you there!

### Moderator:

**Mark Amtower** is founding partner of the government contact advisory firm *Amtower & Company*, of Highland, Maryland and founder and Director of the Government Market Master™ Forum continuing professional education program. Mark is a leading government marketing consultant, speaker, award-winning LinkedIn expert & trainer, Amazon best-selling author & host of *Amtower Off Center* on Federal News Radio. Mark advises small, medium and large companies on all facets of marketing to the government. He is among the most recognized professionals in the government market. His books, *Government Marketing Best Practices* (2005) and Amazon best seller *Selling to the Government* (2011) are industry standards. He has been quoted in over 200 publications worldwide and speaks at 30+ industry events each year. His radio show, *Amtower Off Center,* is in its seventh year on Federal News Radio and was the first radio show in the country to address issues concerning issues impacting the government contracting community. He is widely known for all black attire, dry wit and candor in his articles, books, consulting, radio interviews, presentations and keynotes. His 2013 presentation before the APMP-NCA Chapter, *How Proposal and Capture Professionals Can Leverage LinkedIn*, was our most popular event of the year.

Remember you earn 5 CEUs towards your certification by attending the NCA events!

### Your Panel:

**Bob Lohfeld** is founder of Lohfeld Consulting Group and writes the Capture Management column in *Washington Technology* magazine. His firm works with over 200 government contractors helping them accelerate their revenue growth in the government market by winning new and recompete business. Lohfeld Consulting provides government market strategy and pipeline development, capture and proposal consulting, training for capture and proposal managers, and a SharePoint based software product called WinCenter that companies use to integrate and manage business development, capture and proposal management. Prior to forming Lohfeld Consulting Group, Bob served as Division President at Lockheed Martin, Vice President of Lockheed Martin Information Technology, Senior Vice President at OAO Corporation, Systems Engineering

Manager at Computer Sciences Corp. (CSC), and Program Manager at Fairchild Industries. Bob served as Program Chairperson and member of the Board of Directors for the Association for Proposal Management Professionals National Capital Area Chapter (APMP-NCA), Chairman of the American Council on Technology Industry Advisory Council (ACT/IAC), Vice Chairman of the Technology Council of Maryland (TCM), and Board Member of the Armed Forces Communications and Electronics Association (AFCEA), Government Electronics and Information Association (GEIA), and the Juvenile Diabetes Research Foundation (JDRF Capital Region). He is a three-time winner of Federal Computer Week's Federal 100 Award.

**Kristin Dufrene**, CPP APMP Fellow is Vice President of Capture and Proposal Excellence at CACI International, Inc. Since joining CACI in 2002, her focus has been on "Business Sustainment". Kristin implemented a program that resulted in industry-leading capture rates for recompete bids, increasing the capture rate from 73% to 92% in the first year of practice. She managed the entire proposal development lifecycle for CACI corporate recompetes and led all aspects of the corporate recompete proposal process, from pipeline management, quarterly reviews, strategy, and milestone planning through the assignment of proposal managers and proposal review. Kristin presented "Business Sustainment: Winning Recompetes by Reusing, Recycling, and Renewing" at the 2010 International Conference, and again to the Mid-Atlantic Chapter in 2012. She has been a member of APMP since 1992, and has recently been appointed to the APMP Board of Directors. Kristin has presented 11 times at APMP's International Conferences and is former Chair of the Government-Industry Task Force. She is also co-chair of the Federal Community of Practice and member of the newly formed Procurement Improvement Committee (PIC).

**Nigel Thacker** is owner and Managing Director (MD) of the UK-based firm Rebidding Solutions, which specializes in helping incumbents retain their existing contracts. As Business Development Director and Managing Director responsible for portfolios of contracts, and since 2012 as MD of Rebidding Solutions, he has led or consulted on over 20 recompeted contracts in the past 7 years, with combined value of over $500M. To date, none of these recompetes have been lost. He has also run a range of new business bids, overturning incumbents on a number of occasions. Nigel's career in outsourcing started with Serco PLC, where he was the Group Lead on developing best practices in bidding, transition, contract management and recompetes for this international business services company. He is the author of two books on Recompetes (to date the only books published focusing on the subject): *Winning Your Rebid* (Gower 2012) and *The Recompete Guide* (CAI/SISCo 2013). Through the business website (www.rebidsolutions.co), the LinkedIn group *Rebidding Best Practice* (created and run by Nigel), and other publications, Nigel publishes regular articles on aspects of successful recompetes. He has also presented as a speaker on the subject to the APMP in the UK and in Holland at the Strategic Proposals NL conference on Recompetes as well as presenting the Rebid Preparation Workshop.

# Continuing Professional Development (CPD)

## Did You Know???

That Continuing Professional Development (CPD) is a vital part of the APMP Certification Program, and we want to show you how to earn and track Continuing Education Units (CEUs). CEUs are important because they:

- Represent your commitment to your CPD
- Track credits for educational opportunities you have taken
- Are periodically audited by the APMP Chief Examiner. The Chief Examiner checks about 60 percent of each APMP-certified member's CEUs in each audit cycle.

### APMP CEU Requirements

APMP-certified members must earn this many CEUs ***every 2 years***:

| Certification Level | CEUs |
|---|---|
| **Foundation** | 20 |
| **Practitioner** | 40 |
| **Professional** | 40 |

### How to Earn CEUs

| Home Based Learning | CEUs |
|---|---|
| **Subjects studied** should be relevant to a proposals environment, meet a specified purpose, and use knowledgeable resources. Includes:<br>• Private study, structured reading on particular themes or topics.<br>• Use of audio, video, distance learning or multi-media resources | 5 |
| ACTION ITEM<br>• Summarize in less than 350 words: the reason for study, key learning point, a summary of the number of hours spent, and reference materials used | |

| Training | CEUs |
|---|---|
| Includes:<br>• Training, workshops, seminars, or courses by external (commercial or educational organizations) or<br>• (Internal company training) resources, attended that relate to any aspect of the Business Development Process | |
| ACTION ITEM<br>• Summarize in less than 350 words: a description of the key learning points | |
| **Training** Approved by APMP (minimum 4 Hours, may include multiple short courses) | 5 |
| **Training** Approved by the APMP (1 day) | 8 |
| **Training** Approved by the APMP (2 days or more) | 10 |
| **e-learning** (minimum of 4 hours) approved by the APMP (determined during assessment) | up to 10 |
| **Training** not approved by the APMP (minimum of 4 hours, may include multiple short courses) | 3 |
| **e-learning**, not approved by APMP (minimum of 4 hours) | 3 |

| Preparation of Materials* | CEUs up to 20 |
| --- | --- |
| **Articles** - Published Articles that relate to any aspect of Business Development Includes:<br>• Journals or newsletters for a professional organization (i.e., the APMP Journal, Perspective and APMP chapter newsletters) | 3 |
| ACTION ITEM<br>• Provide a copy of the published article and details regarding where and when the article was published | |
| **Website Material and Blog Moderation** | 5 |
| **Contributions** to professional organizations, commercial companies and non-profit organization web site material and articles | 10 |
| **Moderating professional blogs** for a continuous period in excess of 3 months. A professional blog is defined as a blog relating to business development | 10 |
| ACTION ITEM<br>• Provide a copy of the published website article or details of length of time acting as a moderator to a professional blog | |
| **Presentations at Conferences** Includes:<br>• Presentation at a professional organization, commercial company or not for profit organization's conference, symposia, seminar, meeting, lecture, or workshop | |
| ACTION ITEM<br>• Provide a copy of the presentation and details of where and when the presentation was made | |
| **Published Books** that are publicly available for topics related to Business Development | 20 |
| ACTION ITEM<br>• Provide details of the book name, publisher and date of publication | |
| **Revisions to Previously Published Books** | 10 |
| ACTION ITEM<br>• Provide details of the revisions made, and the date the revisions were published | |

| Event Attendance* | CEUs |
| --- | --- |
| **Full-day** (or more) conference, symposia, seminar, meeting conducted by a professional organization or commercial/not for profit organization | 10 |
| **Less than a full-day** conference, symposia, seminar, meeting conducted by a professional organization or commercial/not for profit organization | 5 |
| **Local APMP Chapter**, or other Business Development professional body meeting | 5 |
| ACTION ITEM<br>• Maintain a record card signed by a board member or chapter leader, as evidence of attendance | |

| Serve the Profession as a Volunteer for a full year (pro rata) | CEUs |
| --- | --- |
| **International** APMP Board Member | 20 |
| **Local** Chapter APMP Board Member | 15 |
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| ACTION ITEM<br>• Maintain a record signed by the local or main board CEO | |

** Individuals who attend a full event and are speakers at that event qualify to claim Event Attendance and Preparation of Materials CEUs.*

## 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...

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