GOVERNMENT & COMMERCIAL PROPOSALS

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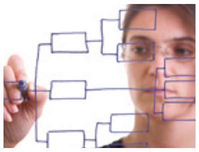
NCA APMP NATIONAL CAPITAL AREA

EXECUTIVE summary

Winter 2015 | Volume 22, Issue 1

This Issue's Theme: **What Does Your Customer Really Want – And How Do You Find Out What Is "Behind The Curtain"?**

Inside:



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

What Does A Contracting Officer Want?

Considerations for Developing Responsive Proposals to Government Solicitations

by Stephen J. Yuter, CPCM, CFCM, PMP, Fellow

Too often I get the question, what does the Government want? My answer is always the same: look like a partner to the Government and understand what they **need**. By doing so, you become a responsive bidder to any RFP. So, what makes a proposal responsive?

Straight, No Chaser

A winning proposal is easy to evaluate and is presented in a straight-forward manner. Cut down on pages devoted to company fluff and devote space to what matters - how you bring value to the customer, and how you will deliver on the requirement(s). Write the proposal to reflect the evaluation criteria, and then explain how or why. Give Government proposal evaluators what they want and need right up front, in firm and positive, direct statements. Similarly, if there is anything special or unique about your proposal that you the want the Government evaluators to know, present it up front. Explain what your approach will do for them, what benefits the Government will realize, and then tell them how you will do it. The overall goal is to give the evaluators what they want, in the order they want it. Think about why they are reading the proposal and what they are evaluating. Always put yourself in the shoes of the reader, understand your customer's priorities, and be clear on what your company can deliver.

Bottom line: Stop selling and start understanding.

Pay Attention to Sections C, H, L, and M

These key sections of the solicitation are imperative. Why? They identify the need and specify how the Government will evaluate the capabilities presented in your proposal.

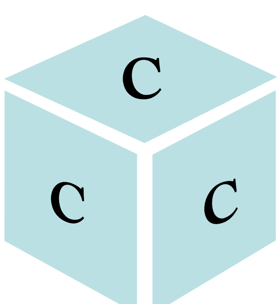
Section C contains a description of the work that will be performed on the contract, describes the customer's need, place of performance, and technical work areas. Dissect the SOW, identify the main requirement(s), and craft a response to ensure you address each requirement given the strengths and weaknesses of your organization. Most importantly, identify the customer's key areas of concerns while ensuring ambiguous requirements are thoroughly assessed and assumptions documented. Always look for requirements, contradictions, feasibility, and opportunities for differentiation between you and your competitors.

Ensure you are compliant with Section H because it incorporates multiple government procurement requirements (often agency-specific) into the contract. Work location (sometimes multiple), travel requests and procedures, key personnel requirements/substitutions, Organizational Conflicts of Interest (OCI), transition-in and –out periods, and security requirements are all specified here.

Like the dress code at a country club, Section L is not a suggestion. Anything but verbatim compliance to Section L is highly discouraged. Section L provides implicit instructions for responding to the RFP, including proposal format, organization, and submission timeline. Pay particular attention to instructions regarding page count, page layout (margins, fonts, page sizes), submission method, and outline/content.

Like it or not, Section M dictates the criteria the Government will use to award the contract and your proposal strategy should be guided accordingly. Focus on the method of evaluation (best value, lowest price, etc.), cost reasonableness, the methodology described for evaluating each part of the proposal, and the relative importance of each proposal part. Evaluation standards are the baseline against which the agency evaluates the offeror's proposals to determine their acceptability and value. Standards require evaluators to evaluate proposals against uniform objectives *rather than against other proposals*.

Bottom line: Read it all. Adhere to it all.



Focus on the Three "C's" of Responsive Proposals

Customer-focused

- Writes to the customer's needs
- Reflects understanding from the customer's point of view
- Demonstrates value
- Inspires confidence in delivery

Compelling

- Translates features into benefits
- Transitions from engineering to customer's perspective
- Has a value proposition and demonstrates how it is accomplished
- Tells a story well

Complete

- Wears the reader's shoes
- Few if any typos or gaps that distract
- Connects the dots

Bottom line: Don't repeat the customer (especially any parts of the SOW verbatim) - clearly identify each requirement, and state how you are meeting or exceeding it in a way that is beneficial and advantageous to the Government.

Risk Awareness and Considerations

It is always prudent to anticipate the likely strategies of your competitor's proposals. By evaluating competitor's strengths and weaknesses, your company can best determine how to neutralize their win themes, benefits, and discriminators in your proposal.

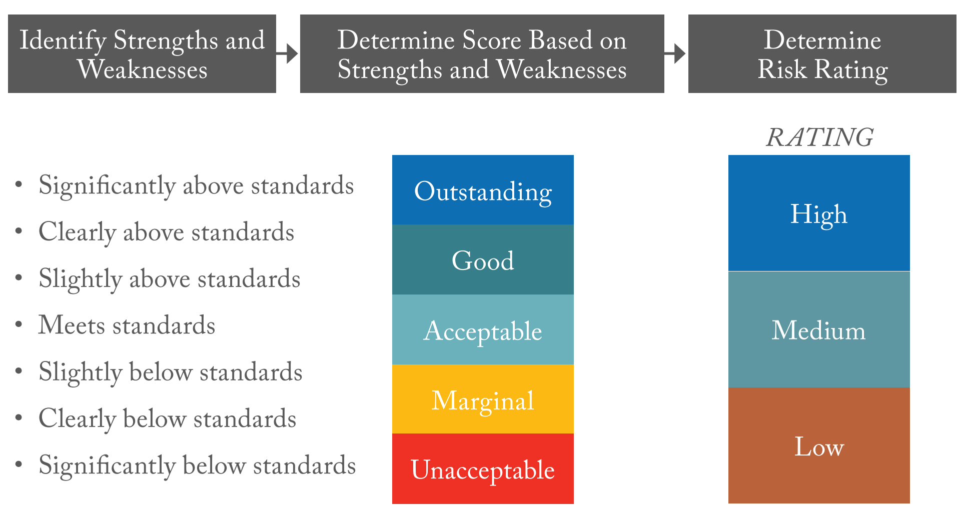
It is also critical to identify any risks associated with each requirement or customer "hot button", and how you will mitigate them.

Technical Risk. Identify technical issues that present cost, schedule, or performance risks. Two types risk: (a) those inherent in the work itself and (b) those that are specific to your organization. Ensure technical assumptions are not too aggressive.

Schedule Risk. Ensure the schedule is realistic. Do not ignore the implications of using a schedule that both you and the customer know is unrealistic (consider alternatives).

Cost Risk. Ensure that you conduct a sensitivity analysis to understand the implications develop a proper estimate and then make a pricing decision.

Bottom line: Government evaluators are evaluating proposals to assess risk.



Debriefings

An award is announced and your company is not the winner. You are disappointed, but the Government's focus is on being risk-averse. A debriefing (whether oral or written) will provide valuable insights to help you prepare a better, more responsive proposal the next time. My personal belief is that more information is better, and a comprehensive debrief assists in building the relationship between contractor and Government. Your organization can learn what was liked and not liked about your proposal and technical solution, and obtain suggestions about what you can do to position your company differently next time.

Bottom line: Ask for a debriefing. It can only be advantageous to your company in bidding future opportunities.

Final Thoughts

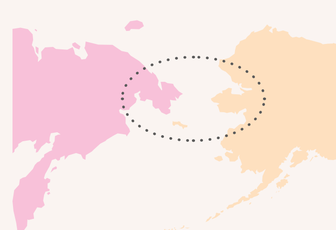
- **Customer-focused content is needed to win.** You win by effectively communicating to the customer that you understand and have proposed a solution that addresses and fulfills their requirement(s).
- **Ask yourself:** How important is this to the reader? What is my value proposition? Is my message compelling? Does this make me look like a good addition to the Government's team?
- **Explain how certifications your organization possesses (CMMI, ISO, Six Sigma, etc.) can benefit the customer and how they were implemented on prior projects or in day-to-day operations.** Don't just state you have them; substantiate your statements with rationale, assumptions, explanations, and logic.
- **Ensure that the proposal speaks with one voice.** The communication, messaging and themes must be consistent throughout.
- **Bid on the requirements of the current RFP rather than relying on an old proposal.** Bid what the Government needs and not what you think "they really want". This is imperative because, while in most RFP processes price is not the most important evaluation criteria for making the award, the budget is always nearly aligned to the SOW/PWS.

Bottom line: Find out all as much as you can about the customer to prepare a responsive proposal. Priorities, preferences, trade-off decisions, source selection, past experience, and desired results are all of vital importance.

Stephen J. Yuter, CPCM, CFCM, PMP, Fellow is the Director of Acquisition and Head of the Contracting Activity at the Department of Health and Human Services (DHHS), Indian Health Service. He provides division-wide leadership, comprehensive acquisition support, policy oversight, workforce development, and performance measurement for a workforce of nearly 100 procurement professionals. Prior to assuming his current position, he served as the Deputy Assistant Chief Procurement Officer for Policy, Systems, and Risk Management at the Office of Housing and Urban Development and as a Branch Chief with the DHHS Program Support Center. Mr. Yuter currently serves on the NCMA Board of Directors and has been a program speaker at events for NCMA, APMP, CAUCUS, and NLPA. Mr. Yuter holds a B.S in Marketing and Business Administration from Florida Atlantic University, an M.S. in Management from the Florida Institute of Technology, and a Master's Certificate in Government Contracting from The George Washington University School of Business. He has been recognized as one of the Top Professionals Under 40 in Contract Management. Mr. Yuter can be contacted at stephen.yuter@ihs.gov.

Fun Fact...

Russia and America are less than 4 km apart at the nearest point



Ask the Graphics Guru

How Do I Find What My Customer Really Wants?

by Mike Parkinson, CPP APMP Fellow

Knowing what your customer truly wants is critical to winning a proposal. A deep understanding of your customer's needs helps you connect your solution with their actual (sometimes unstated) needs. Poorly informed assumptions about your customer's hopes, fears and biases almost always result in a loss.

The following is the process I use to define customer needs:

1. Ask the right questions.
2. Research.
3. Understand human behavior.

1. Ask the right questions.

Assuming you have a dialogue with your customer, ask open-ended questions. Let them share as much as possible.

Recently, I was teaching a Solutioning class. In an effort to explain the difference between a feature and a benefit, I asked attendees to tell me why they own a drill. Most said, "To make a hole." Surprisingly, one attendee replied, "To keep my father-in-law from coming over." When she needed a drill in the past, her father-in-law would arrive, drill in hand, and overstay his welcome. I would have never guessed her specific benefit had I not asked.

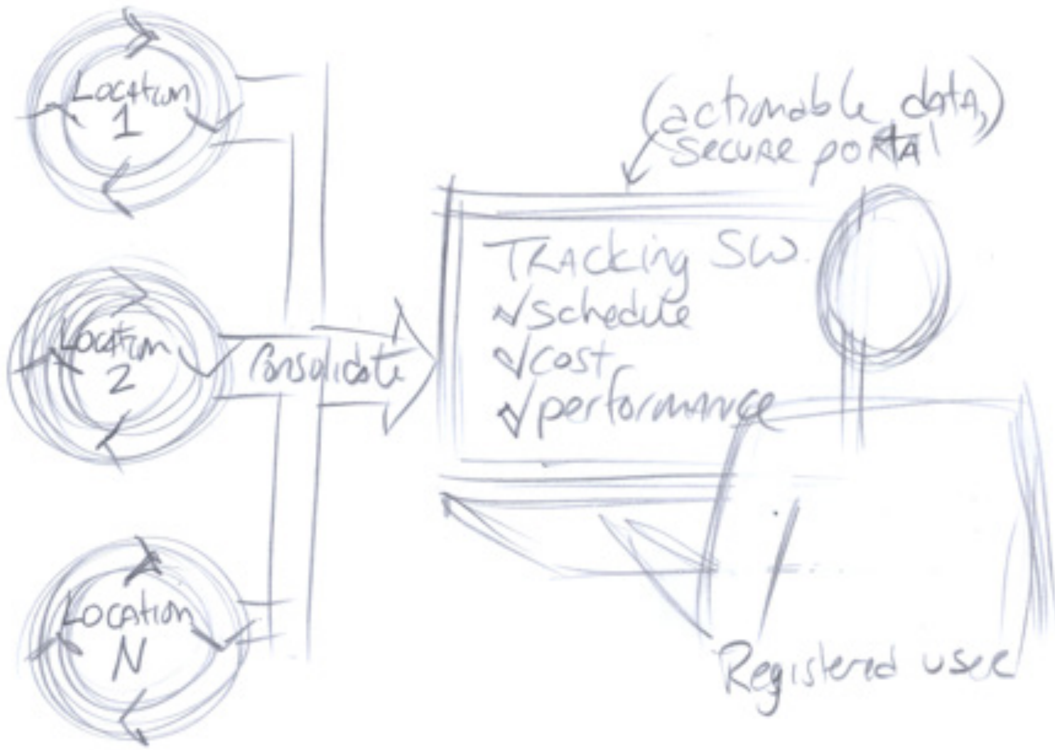
The following are effective open-ended questions to discover more about your client's needs:

1. What is going on?
2. Can you be more specific? Give me an example.
3. How long has this been a problem?
4. What has not solving the problem cost you?
5. If you could wave a magic wand, what would the solution look like?
6. Why haven't you done this (solved the problem)?
7. How do you feel about that?

Dr. Robert Frey, author of *Successful Proposal Strategies for Small Businesses*, asks future and current customers a specific question, "How would you paint a picture of success on this task/project/program now and going forward?" He listens closely to the customer's response. His goal (and your goal) is to learn about the customer's current state, what caused the current challenges, and what the desired outcome— short is and long term. Uncover the customer's dreams and what concerns keep them up at night.

Because many customers can be guarded with information related to company needs, I ask them to tell a story about their challenges. Through stories, a customer will relive their challenge. Most importantly, they will relive how it felt to encounter and try to overcome it. Emotional responses reveal more about true desires and personal fears so you can uncover how to connect your solution with their objectives by listening to their story.

Images are another way to get to the heart of a challenge. Sketch a solution and you will quickly discover



disconnects between your suggestion and what the customer really desires. You do not have to be a great artist like Michelangelo to do this. Draw a rough sketch and walk your customer through your idea. Then ask them, "What am I missing?"

2. Research.

Search online for articles and information your customer has posted. Explore their website, blogs and LinkedIn groups. Find people close to your customer and ask questions. Seek different perspectives. The more you understand their world, the more likely you are to determine their real needs.

My research helps me choose words and images for my proposal that reflects the customer. In turn, they will see themselves in my document and connect the content to their goals and challenges.

3. Understand human behavior.

Behavioral psychology teaches us that decisions are not as logical as we want them to be. In fact, all decisions our customers make must involve their emotions. Our customers' choices are driven by a combination of extrinsic (conscious) and intrinsic (subconscious) thoughts.

Herbert A. Simon, Nobel Prize winning scholar at the Carnegie Mellon Institute in Pittsburgh, studied corporate decision-making and found that people often ignored formal decision-making models because of time constraints, incomplete information, the inability to calculate consequences, and other variables. Intuitive judgment was the process for most decisions. Neurologist Antonio Damasio reviewed research on patients with damaged ventromedial frontal cortices of the brain, which impaired their ability to feel but left their ability to think analytically intact. Damasio discovered that the patients were unable to make rational decisions even though their ability to reason was fully functional. He concluded that reasoning "depends, to a considerable extent, on a continual ability to experience feelings."

For example, would you buy a solution from someone you did not trust? Trust is an emotion. The science behind making decisions proves that, although we are not logical, we are mostly predictable in the choices we will make. Understanding human behavior gives you insight into why your customers choose what they choose. It helps you select which intrinsic elements must be addressed (and how) to improve the likelihood of a win. I recommend reading the following books to learn more about behavioral psychology and how to use it to create effective proposals:

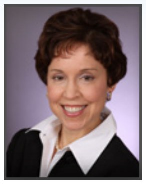
1. Predictably Irrational, Dan Ariely
2. Nudge, Richard H. Thaler
3. The Tipping Point, Malcolm Gladwell

I use graphics to win more proposals. My understanding of human behavior supports the benefits of visual communication. For example, based on mountains of research (and personal experience) the quality of the proposal graphics communicates the quality of the solution and solution provider. Humans cannot isolate emotions from decision-making. Knowing how our customers think improves win rates by connecting stated goals with unstated desires.

Conclusion

By far, the best path to understanding what your customer really wants is by asking the right questions; however, science tells us that our customer may not want to or may not be able to articulate their true wants/needs. For this reason, use research and an understanding of human behavior to fill the gaps and connect the dots for your customer. Do this and you will be more successful.

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.



Capture And Proposal Innovations: Activate Your Listening Campaign

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

What do customers really want? As capture and proposal professionals, that question haunts us. We work very hard to understand customer hot buttons and craft our solution accordingly. However, too often, the proposal focuses too much on our solution and too little on articulating a value proposition that truly reflects the customers' desires.

As you strive to understand what is "behind the curtain", take an honest look at your listening skills. As George Bernard Shaw said, *"The single biggest problem in communication is the illusion that it has taken place."* We often schedule meetings with customers and spend most of the allotted time presenting our capabilities rather than listening to the customers' wants and needs. In reality, your capture plan should be 90 percent about listening and 10 percent about talking. However, listening, as opposed to hearing, is a learned skill that requires active, conscious effort. So, how can you best embark on an innovative **listening** campaign?

The "customer" is really the "customers". You may have noticed that I refer to the customer in the plural. Remember, a single customer does not exist. Each opportunity has many stakeholders: programmatic, technical, subject matter experts, acquisition, executives. Your listening campaign must include all of them. If possible, identify and engage with the full gamut of leaders, influencers, followers and decision-makers.

Listen to employees too. Engagement need not be directly with the customers. Current and former employees of the customer organization, the incumbent contractor, if there is one, and teaming partners will often be quite honest with you regarding problem areas as well as potential successful strategies. Research employees on LinkedIn and reach out. Make sure to use personal emails or LinkedIn messages after hours to avoid disruption to the work day.

Ask specific questions. Instead of asking the customers what you can do to help them, suggest solutions and listen to their reaction. Ask very specific questions which require them to answer with examples. For instance, ask customers about:

- Acquisition strategy requirements, preferred vehicles and key evaluation factor preferences for this procurement
- Technology requirements and preferences
- Negotiable and non-negotiable requirements
- Performance level and customer satisfaction expectations
- Mission and program objectives, both qualitative and quantitative

- Transition timing
- Budget, change and risk tolerances
- Other drivers such as Executive Orders, Congressional mandates and the like

Moving from general to specific questions generates a higher level of engagement as well as the more thoughtful and detailed responses necessary to gain the insights you are seeking. For better results, invest the time to improve your questioning techniques.

Shape the opportunity. Without shaping, you are at a real disadvantage. Shaping is more about listening to stakeholders and, based on listening, suggesting scope, evaluation factors, procurement vehicles, technologies and the like that will work well. Propose ideas based on evidence and listen to the reaction. Come back with new ideas, and listen some more. Once the RFP is released, analyze the solicitation to ensure it reflects the shaping you think you accomplished. If it doesn't, seriously re-evaluate your bid decision and/or adapt your solution accordingly.

Identify unanswered questions. Knowledge gaps may require that you identify additional stakeholders with whom to engage and/or identify new or better questions. Make sure all gaps are covered prior to RFP release and that you have fully listened, shaped and tested your value proposition with customers.

Avoid jargon and acronyms. Often we fall into the habit of using idioms, acronyms and/or complex terminology. Customers may not fully understand what you are saying. Try speaking in plain English for greater clarity of intent.

Repeat, repeat, repeat. When customers talk, repeat what you think they said to gain confirmation. When you talk, ask each meeting participant to offer their perspective on and/or summary of what you just said. By making everyone re-frame their understanding, you will gain greater precision.

Poor listening is costly because it results in incorrect assumptions surrounding win strategy, misunderstanding of the desired value proposition, and errors that waste Bid and Proposal (B&P) money. Understanding what the customer really wants begins and ends with your listening skill innovations.

If you have ideas on additional innovations I should cover in future columns, email me at lpafe@lohfeld-consulting.com.

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.

NCA Kicks Off Its 2nd Annual Mentor Protégé Program!

by Alexis Dimouro

With 17 pairs of Mentor/Protégé's, most from the DC Metro area and many from further out including some from as far as Florida or Massachusetts. We even have an international team from Kenya and Armenia! We kicked off this year's program with a bang! 22 enthusiastic members joined the Mentorship Kickoff to gather information about the exciting events planned for this year. We are trying out new technologies and planning dynamic speakers to further enhance the Mentor/Protégé experience and complement the individual efforts from each pair. We are excited to learn and grow with the group this year and to hear the creative ways they come up with to promote their growth and professional development. Welcome to all of the new teams!

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. Currently serves on APMP National Capitol Area (NCA) Chapter Board of Directors as Chairman of Professional Development, and as a mentor for the APMP Accreditation Program.

Note From the E-Zine Chair and Chief Editor, Sareesh Rawat

We are always looking to improve the E-Zine and would love to hear from you!

What did you think of this issue of the Executive Summary? What did you think of specific articles? Have questions, comments or suggestions for the authors or the editors? What articles, and themes would you like to see in future issues of the Executive Summary?

Please drop us a line at ezine@apmpnca.org or contact Sareesh at (301) 523-5157. We look forward to hearing from you!

Legal Corner

What Does Your Customer Really Want? Does It Matter?

by Shlomo D. Katz, Counsel, Brown Rudnick LLP

This issue of the Executive Summary asks: *What does your customer really want – and how do you find out what's "behind the curtain"?* This article, however, asks whether that's the right question to ask. Knowing what the customer really wants may help offerors win the procurement if the "customer" happens to be on the source evaluation board or, better yet, is the source selection official. But, will an offeror that wins a contract because it knows what the customer really wants, as opposed to what the solicitation asks for, keep the contract after a bid protest is filed against it? And, will it perform the contract at a profit?

Make no mistake! Business intelligence is important. Talking to your customers and potential customers about what they need and how you can help them accomplish their mission is a good thing to do. In fact, the Office of 'Federal' Procurement Policy issued a series of memoranda a few years ago intended to foster communication between contractors and Government personnel. (See Legal Corner: Myth-Busters vs. Capture Planners in the Summer 2012 Executive Summary.)

Nevertheless, thinking that you can outsmart the system by offering what the customer really wants, even if it's not what the solicitation requests, is risky on several levels.

The Government Accountability Office (GAO) has said many times that it's the offeror's responsibility to submit a proposal that responds to, and demonstrates a clear understanding of, the solicitation requirements; where a proposal fails to do so, the offeror runs the risk that the procuring agency will evaluate the proposal unfavorably. If an offeror's proposal appears to take exception to solicitation requirements, that offeror risks having its proposal rejected as technically unacceptable.

What if the proposal is not rejected by the agency, and the offeror does win the award? A disappointed offeror may protest that the agency relaxed the requirements for the awardee or applied unstated evaluation criteria since all of the offerors were judged based on what the solicitation said and one offeror--the awardee--was judged by a different standard.

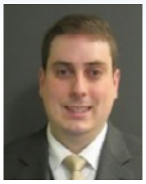
In a protest last year, for example, GAO overturned an agency award because one offeror had been downgraded for failing to address matters that were discussed at the Industry

Day, but were never incorporated into the RFP (see Risk Analysis and Mitigation Partners, B-409687, 2014 CPD ¶214). What was discussed at the Industry Day may have been what the customer really wanted, but it was not what the RFP asked for, so it could not have been the basis for evaluation or award.

Even if there's no protest, the awardee is not home free yet. This situation is a recipe for disputes during contract performance. The contracting officer may think that the contractor promised to deliver one solution--the one described in the solicitation's statement of work—while the "user" or "customer" will be expecting a different solution—the one described in the proposal or the oral presentations. That, in turn, may have two unpleasant consequences: First, your company may spend its hard-earned profits preparing claims and litigating disputes instead of returning them to the shareholders (or to you, in the form of a bonus). Second, you will be fighting with your customer--never the ideal situation.

When the solicitation allows for creativity, flexibility, and innovation, by all means, make sure you give the customer what he or she wants--making sure, of course, to be clear about what you are offering and at what price. But, take care not to be too clever for your own good.

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.

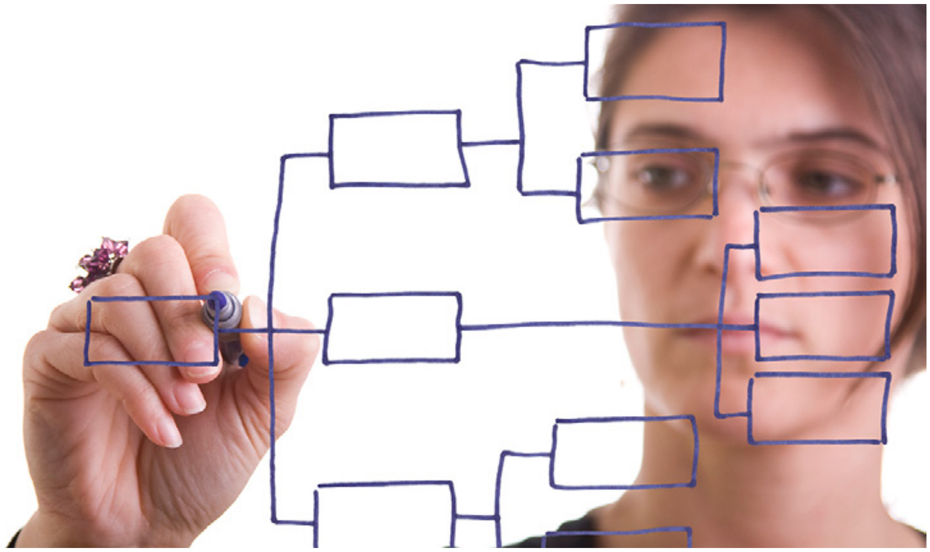


What's The Big Secret In 'Federal' Buying?

by Adam Owenby

Any company looking to sell to the 'Federal' Government faces the same basic challenges: identifying the appropriate opportunity, positioning the company best to win, and ultimately submitting the most competitive proposal in response to a solicitation. To answer these challenges we rely on best practices in capture management.

Capture management is about relationship building and offers the clearest path to understanding what the customer wants and, more importantly, why they want it. It is about finding the right niche for your service or product with the right agency at the right time. Customers want to engage with companies—and people—that they trust. They want a sense that the people they are working with understand their unique needs and mission within the 'Federal' space. From the initial interactions with a potential 'Federal' buyer, capture managers must instill confidence that they have a mastery of their target agency. This is distinct from a traditional sales approach. Government buyers are reluctant to engage with the person they perceive as a "salesperson" from the private sector. In fact, the underprepared salesperson can be the biggest obstacle to closing a deal because the lack of agency specific knowledge implies a lack of general interest and attention to detail, sinking the company's standing in the mind of the customer.



In capture planning, the goal is to go from the "unknown position" to the "favored position. " Sending in the underprepared salesperson has the opposite effect: going from the "unknown positon" to the "disfavored position." In every sale to the 'Federal' Government, it should be the capture manager who is responsible for winning or losing the opportunity.

So how does a company gather intelligence from the inside without coming right out and asking for it and risk alienating the customer? Well, there is open source research, of course. This would mean utilizing public information online, at trade shows, industry days, and the like. Using these resources is basic to the capture process if for no other reason than anyone engaging with the customer will be expected to have this minimum level of knowledge. Additionally, you should never hesitate to utilize your incumbent staff onsite within the agency to provide insight into the hot buttons. They can provide you with information no one else can find. Research though is not enough, true capture uses research to go that extra step and help the customer connect the dots within their own agency and the changing tempo of Capitol Hill. You need to understand the environment that your agency is working in and let them understand how you can help them stay one step ahead of change. To facilitate this, you should again leverage your onsite staff. They can facilitate meetings with the appropriate decision makers and provide you with those great moments to get some time in front of the client (or potential client).

The best way to build new business is by using well-placed resources to leverage new opportunities using defined strategies. No matter how sophisticated you are at gathering information through the sources described above and helping your customer put everything into perspective, there are more effective ways to delve deeper into the needs of an agency that are essential to winning deals.

The first strategy is to focus your effort. When sequestration hit, many companies took the approach of drastically broadening their portfolio in order to keep the pipeline as theoretically full as it was before the cuts. However, taking such a shotgun approach rarely yields the desired results. Companies that want to win in a hyper-competitive market focus only on those opportunities they have a chance of winning. Companies with drive win more frequently when they focus on mastering the needs of specific customers than when they chase bids from agency to agency. The way to implement this effectively is through early and frequent engagement with the executive teams. Executives should push their business developers and capture managers to justify opportunities in the pipeline. When the capture implementation is not there and the bid pursuit will take significant resources, the cost benefit analysis should skew towards qualifying fewer opportunities but with much higher quality.

The second strategy is to engage early. Late qualification usually means losing the bid. Good business development is a cycle with long lead times requiring deep, contextual understanding of a need long before a solicitation is even developed. This type of planning results in more realistic pipelines with higher win rates. Having the inside track gives executives more realistic views of potential work and costs the company significantly less money and time than sales strategies based on bid chasing

The third strategy is building the right team. Companies with successful 'Federal' sales strategies win because they have invested in the processes and people necessary to grow that segment of their business. The goal is to know what the customer wants. The best way to do this is by finding the right capture managers for your targeted agencies. The smartest people at the most successful companies are often the capture managers. They have years of experience in a range of positions often across both public and private sectors. They have technological knowledge, project management experience, and have networked with the decision makers either through years of solution implementations in agencies or through their own experiences working at the agency. They have great leadership skills and deep organizational understanding. Most importantly, they are adaptable team players.

Engaging early means investing in the relationships with the customer long before the need has been clearly defined. Doing this positions your company to help the customer discover hidden issues, see the benefits of improvement, and justify your solution implementation. This is critical to understanding the issues that are often "behind the curtain." Two key elements define successful interactions with customers: staying customer focused throughout the conversation and actively listening. By staying customer focused, the capture manager does not alienate the customer by becoming adversarial. Instead, they see the solution provider as a partner and trusted advisor who not only understands the mission of the agency and the challenges it faces, but also brings an outsider's view to the table which can generate novel strategies and solutions which ultimately save the agency time and the taxpayer money. This level of trust is fostered through engaged and active listening—not through a process of constantly trying to sell them on your idea, but rather through objective, neutral observations and clarifying questions.

Mature companies selling to the 'Federal' Government understand the importance of embracing sound practices in capture management. The secret is no secret at all, really. All that is required is dedication and commitment to the capture process and proper resource allocation to ensure that capture managers are positioned to gather the right intelligence for the strategic edge that can often mean the difference between a win and a loss.

Adam Owenby is Corporate Counsel, Proposals and Contracts at VSGi. He is an attorney with expertise in acquisition, 'Federal' contracting, and national security law. He holds the CF APMP designation and is an experienced proposal manager, contracts manager, and corporate counsel who applies more than 9 years of analytic experience in the legal, financial, and consulting industries to help the private sector provide solutions to Government. You can contact Mr. Owenby at adam@owenbymail.com.

The Model For A Customer-Centric Orals: The Philly Cheesesteak

by Lawrence Tracy

What does an oral presentation for a Government contract have in common with a sandwich? Bear with me, my fellow APMP-NCA members, and you will see that the "sandwich" is an apt model for what can be the deciding factor in awarding the contract. But not just any sandwich - I'm referring to that classic from my native Philadelphia - the Cheesesteak. In its most simplistic form, the Oral Presentation-Cheesesteak comparison is based on their three similar components;

For the orals:

1. The opening statement by the Project Manager (PM)
2. The Technical Solution to the requirements of the RFP by the key personnel who will be working on the contract
3. The closing statement by the PM emphasizing the discriminators which make this the best company to solve the Government agency's problem

For the Cheesesteak:

1. The bottom half of the roll
2. The steak, cheese and onions which are the essence of the sandwich
3. The top half of the roll

Although I will be touting the importance of the PM's opening and closing statements, and the unique quality of the rolls of a Philly Cheesesteak, the most important elements of the two are, of course, the middle two: the technical solution by the key personnel, and the ingredients of the sandwich. They are literally the "meat" which cause evaluators to award, and eaters to salivate. No one would buy a Cheesesteak that had no steak and cheese, just as no Government agency would award a contract to a company whose oral presentation lacked a technical solution. But the rolls of the Cheesesteak, and the corresponding opening and closing statements of the orals, can provide the context to decide which one is the "winner."

Let's start with the orals. After all the submitted proposals have been reviewed by the Government agency, they are whittled down to a precious few: those that are in the Competitive Range. As Capture and Proposal Managers and writers know, there is not a lot of difference, or true discriminators, among these finalists. The companies all have similar technical capabilities to solve the Government's requirements as specified in the RFP. Competing companies, therefore, must find a way to separate themselves from their competitors. The orals provide such an opportunity. Constructing an oral presentation the way a Cheesesteak is built can have excellent results.

Just as the technical proposals submitted to the Government in response to an RFP can be virtually indistinguishable, the same is true for the ingredients for a Cheesesteak. So, what separates the Philly sandwich from poor imitations, such as the so-called Steak and Cheese? Ask Philadelphians, and they will exclaim:

It's the "Bread!"

The bread for Philly's contribution to culinary art, actually a roll, has a taste and texture unlike any other. It blends with, and complements, the Cheesesteak's cheese, steak and onions, for unequalled flavor. Ask any displaced Philadelphians in the Washington, DC area what they think of local sandwiches which claim to be Cheesesteaks, and they will sneeringly say, "Ugh, the bread is terrible!" Unless, that is, the bread is a hearth-baked roll from Amoroso's, the Philadelphia bakery which now exports its product to all fifty states and the District. Perhaps they have patented their recipe, for a true Cheesesteak connoisseur knows the difference between a crisp Amoroso's roll and doughy imitations.

While you are probably salivating for a taste of Philly's finest food, let me now show how the "Amoroso's Factor" can provide a model for oral presentations, and what evaluators are looking for when they size up which company will get the "bread" from a lucrative contract. (Sorry, couldn't resist).

In the age of Low Price, Technically Acceptable (LPTA), there is little wiggle room on price. That leaves the Technical Volume as the area where there is some space to maneuver in order to increase the perception of "acceptability." When an oral presentation is required, the advantage grows, for the personalities and likeability of the presenters, and their ability to tell a persuasive story, can influence the evaluators. Applying the "Amoroso's Factor" of a strong opening - the bottom half of the roll and a resounding close - the top half - can be the deciding factor in causing the evaluators to award the contract to your company.

So what do these two "rolls" consist of in an orals? The main ingredient is passion and enthusiasm, thereby creating the impression that this company really wants the contract because it has the best capability to satisfy the Government's needs. The opening and the closing cannot be a pro forma "why we bid and how we'll do the work" as most orals are. The PM delivering the opening and close must do so with an intensity that shows his/her confidence that the company is ideally suited for the challenge outlined in the RFP.

That leads us the question of what these evaluators are looking for. They are certainly seeking the company which provides the best service for the Government at the lowest cost. But they are also highly risk-averse and fear making a choice which results in being labeled "the idiots who gave the contract to that company."

So these evaluators are between the rock and the hard place. What can you do to give your company an edge? You must reduce the fears and perceived risk of these evaluators. Perhaps the greatest advantage of an oral presentation is that it gives the Government agency evaluators the chance to "size up" the people they will be working with for the duration of the contract. At the end of the workday, do they want to have a beer with these contractors, or be glad they can walk away from them?

In my book The Shortcut to Persuasive Presentations and other writings and presentations I have given on oral presentations, I list six elements evaluators are looking for:

- What is the chemistry between and among team members?
- Does the team have a clear vision of what the Government wants accomplished, or does the presentation suggest the team is still trying to figure out what is required?
- Do the skills of the different companies and individuals complement or clash?
- Is the prime contractor really in charge, or do there appear to be some Prima Donnas among the subcontractors, suggesting later friction?
- Does the presentation demonstrate that the company has the experience to accomplish the project required by the RFP?
- Is there a willingness of team members to accept Government oversight, or an attitude of "give us the contract, then get out of the way?"

(NOTE: A large Government contractor placed these six "concerns" on a framed poster in its training room (without acknowledging who was the author.) Despite the unethical practice, I believe that validates their legitimacy.)

Keeping those six evaluator concerns in mind, let's construct an oral presentation using the "Cheesesteak" model. The foundation of the sandwich is the bottom roll, the foundation of the orals is that opening statement by the PM. He or she, at the outset, must alleviate the worries of those risk-averse evaluators and create a positive perception of the company. This beginning, like the Opening Statement of a trial lawyer, makes the case why this company provides best value for the Government, and can do much to convince the evaluators that they need not fear selecting this company.

Every orals has an opening statement and closing statement, but you want yours to stand out, just as Amoroso's rolls make the Philly Cheesesteak so different than other "Cheesesteaks." This opening should signal the company's adaptability, showing it will keep the headlights on to see potholes in the road, and also be looking in the rearview mirror to see how actions could be improved. The PM must emphasize his/her past performance managing similar projects, and then introduce the key personnel who will be working on the contract, emphasizing their experience on similar projects.

It is these technical experts who are the "steak and cheese" of the proposal. They specify how they will address the requirements of the RFP. This, as stated previously, is the most important part of the oral presentation, showing how they can be innovative. The Government likes that word because it can be interpreted as "at no charge." Each technical expert should "hand off" smoothly to the next expert so they appear a well-coordinated team. A competent presentation suggests a team that can work together without friction on the contract. Conversely, an uncoordinated presentation may be the kiss of death.

The top roll of the "sandwich" is the closing statement by the PM, reiterating those discriminators touted in the opening. The job of the PM is to cause the evaluators to conclude that this is the company which should be awarded the contract. This closing statement need not be lengthy, and in fact should build on what was promised in the opening, much as a lawyer uses the closing statement in a trial to persuade the jury.

Keep in mind that those on the orals team, including the PM, are not experienced presenters but IT specialists, engineers and other technical experts. They are very good at what they do, but not necessarily good at explaining what they do. Moreover, they are now being placed in the unenviable position of having the company's financial future, as well as their jobs, and those of their colleagues, dependent on their ability to make a "sales presentation."

Consequently, when I conduct orals coaching, I volunteer to draft both "rolls." As a technical illiterate, I rarely understand the details of the written proposal and the technical solutions by the subject matter experts in the orals. But I am a writer and can generally craft the story of why this company will give the Government more bang for the buck. I write these opening and closing statements in the "voice" of the PM so he or she can make these words his/her own. We then practice so the PM is comfortable delivering these messages. I also seek to find words or phrases which will "stick" in the minds of the evaluators. (Note: Read the excellent book *Made to Stick* by Chip and Dan

Heath for some ideas on making ideas "sticky.")

An example. An IT company I recently worked with had an enviable record of low turnover of its key technical personnel, an important discriminator in the highly fluid IT industry. They pointed out that a reason for this stability was that when these experts published in professional journals, the company paid them a bonus. I then recommended the PM say the following:

> In academia, the saying is "publish or perish."
>
> In our company, the saying is "publish and profit."

The objective was not to turn a clever phrase, but to highlight the fact that the Government would not be dealing constantly with new people, but would have continuity with the key personnel of this company. That's a huge discriminator, and that phrase helped the fact to "stick" in the minds of the evaluators.

The next step, after "the sandwich" has been prepared, is to have a series of practice sessions simulating both the oral presentation and the Q&A session (see below). These sessions should be videotaped to provide a "game film," and the proposal writers should play the role of the evaluators to help the presenters anticipate questions and develop answers

A cautionary warning on the Q&A session. Because it is interactive, unlike the orals where the evaluators sit silently, the PM and his/her team may relax. Big mistake; it is still "show time." Answer the question, but don't be overly verbose. The more you say, the more targets you provide for the evaluators. When a question is asked that you find less than brilliant, don't say *"Yes, but…."* The evaluator who asked the question may feel you are putting him/her down. Instead, say *"Yes, and we thought the same until our research indicated….."* For the same reason, avoid that terrible response of *"With all due respect."* No respect is intended, and you will alienate the questioner.

The benefit of intense and realistic practice session was shown in a Lockheed TV ad of a few years ago. Two fighter jets were maneuvering in simulated combat, and a dramatic voice intoned "if you train the way you'll fight, you'll fight the way you trained." If presenters practice the way they'll present, they'll present the way they practiced.

Pointing out the importance of technical experts to be able to articulate their concepts, Lee Iacocca, former CEO of Ford and Chrysler, wrote in his 1984 autobiography:

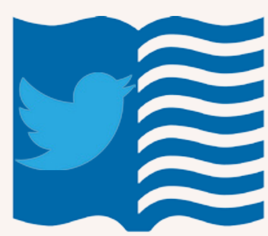
> *"I've known a lot of engineers with terrific ideas who had trouble explaining them to others. It's always a shame when a guy with great talent can't tell a board or committee what's in his head."*

Let's conclude with a return to the South Philly Deli. Just as an authentic Philly Cheesesteak need the hearth-baked Amoroso's roll to highlight the sandwich's ingredients, so too does the technical oral presentation need the right opening and closing statements to separate a company from its competitors. If you ignore these humanizing elements, and depend only on IT and engineering expertise, you are likely leaving a lot of money on the table.

Larry Tracy, author of The Shortcut to Persuasive Presentations, has been cited in various publications, including The Information Please Business Almanac and Sourcebook, as one of the top presentation skills trainers/coaches in the country. A retired Army colonel, he formerly headed the Pentagon's top briefing team, responsible for daily intelligence briefings to the Chairman of the Joint Chiefs of Staff (CJCS). He supervised more than 500 of these multi-media presentations, and personally briefed the CJCS almost 100 times He was later detailed by the White House to the State Department to debate controversial foreign policy issues to hundreds of demanding, often hostile audiences, leading President Ronald Reagan to describe him as "An extraordinarily effective speaker."

Fun Fact...

Every Tweet Americans send is being archived by the library of Congress



What Proposal Evaluators Really Want

by Russell Smith, Speaker Series Chair

The APMP-NCA meeting on October 22, was the best attended of the year with 125 people registered. The presentation featured moderator Robert Katz and a panel of four Government proposal evaluators discussing *"What Do Proposal Evaluators Really Want."* Robert Katz was very effective in finding procurement panelists from different branches of the Government and moderating what many attendees thought was the best presentation of the year. The panelists included the following:

1. Mark Borkowski, Assistant Commissioner at Customs and Border Protection
2. Joanne Woytek, Program Manager of NASA SEWP
3. Nitin Pradhan, former Department of Transportation CIO
4. James Black, an independent consultant who previously worked acquisitions in the Air Force

Richard Crum, a contracting officer from the Department of State, was supposed to be a panelist but was stuck in quarantine as a result of the Ebola epidemic.

Commissioner Borkowski several times touched on *"innovation,"* saying *"the only opportunity for innovation is in process and not product."* Joanne Woytek said *"a lot of the proposals are the same"* and she likes to see *"real innovation"* and *"something really different."* An innovative cycle takes 10 years. It took 10 years for her to get the chat product she wanted.

The question was asked, *"How do you make your interaction with the Government more meaningful?"* Commissioner Borkowski said that the Government needs to use a Statement of Objectives and instead use a Statement of Work. Further, the contractor needs to have something really significant to say, or the Government customer won't remember him.

When asked how he differentiates between proposals, the Commissioner said: *"We look at its strengths, weaknesses, and risk very strictly and don't read between the lines. We are looking for something different. I have to assess how it will make my job easier. You have to connect your solution to my value."* He added, *"In your proposal, point to the part of the evaluation criteria that addresses what you are offering."*

In addressing protests Nittin Pradhan said: *"We use a 'catchall clause' to help win protests on purpose. Often that clause is 'understanding the mission'."* He also recommended that bidders read the Inspector General report on the agency as a part of their intelligence gathering process.

A question from the floor asked if it is true that the incumbent in a best value competition can scare the customer into renewing due to fear of change. Nittin Pradhan responded that the award depends on cost with speed of execution, service, and maintenance. And that if the bidder can provide a real transformative solution, this in effect reduces the cost. Commissioner Borkowski said he scores on the evaluation factors and doesn't read between the lines to give credit to the incumbents. James Black said challengers can win by providing good key personnel and demonstrating that they will not lose continuity.

Russell Smith has been a proposal industry professional for over 35 years. For the past 30 years, he has been president of Organizational Communications Inc. (OCI), a leading proposal consultant firm. He has been a member of APMP for 20 years, previously serving as president of the NCA chapter and currently serving as Speakers Series Committee chairman. He completed the doctorate degree in education at the College of William and Mary and completed previous degrees at the University of Texas. He is a board member of the Children's AIDS Fund, a non-government organization a (NGO) providing relief services in English speaking African countries.

President’s Corner

Welcome To 2015!

by Maryann Lesnick, CP APMP, APMP-NCA President

Welcome to 2015! Here’s to another exciting year for the proposal industry and our Chapter.

What a great topic for the New Year: *"What does your customer really want – and how do you find out what is “behind the curtain”?"*

As the President of the APMP-NCA Chapter Board of Directors, you – the NCA Chapter affiliated membership – are our customers. I am grateful for serving this past year as your trusted leader, and look forward to my second term. In this role it is my job to make sure that we have in place the programs, learning, and networking opportunities to serve our members.

Last year, we revised our mission statement:

“The mission of the APMP-NCA Chapter is to support our members in advancing their professional goals and increasing their capabilities to win business.”

It takes a lot of people to successfully accomplish this mission. I’d like to give you a look “Behind the Curtain” at our Chapter Committees, and explain the work they undertake to support the mission.

Please consider getting involved on one or more committees in 2015! It is a great way to network with industry peers, and to make a difference in the Chapter. Contact information is for each committee is provided.

Thanks in advance for volunteering!

Committee	Committee Objectives
Annual Events Contact: events@apmpnca.org	Plans and coordinates the annual APMP-NCA Mid-Atlantic Conference & Expo. It is the largest gathering of industry professionals in the National Capital Area. Held in the fall, it offers opportunities for hundreds of proposal, bid, capture, BD, and graphics professionals to receive training and develop their professional knowledge and skills. ***Jobs include:*** Program and theme planning, call for speakers, speaker selection and mentoring, program development, track buddy, publicity, logistics, registration, exhibitor coordination, food planning, room monitor, scheduling, graphic design, and editing.
Corporate Partner Program Contact: corporatepartner@apmpnca.org	Manages the Corporate Partner Program. They develop the levels, benefits and fees for the program. Work with the partners to provide value for their membership, and ensure benefits are received. ***Jobs include:*** Promotion, outreach, and coordination with the Corporate Partners; supporting corporate partners at events; planning and managing the partner Expo at the annual conference.
Event Logistics Contact: logistics@apmpnca.org	Responsible for registration and logistics for all Chapter events. The committee works closely with the Speaker Series, Special Events, and Annual Events committees to select venues and catering options, set up a registration site and monitor registrations, create badges, and work with the venue on logistics. ***Jobs include:*** Registration before each event, registration table staffing, contracting and coordinating with event venues, and logistics.
eZine Contact: newsletter@apmpnca.org	Plans, schedules, and coordinates publication of the Chapter’s quarterly Executive Summary newsletter, offered as an electronic magazine (ezine). ***Jobs include:*** Planning topics for each edition, calling for articles, keeping track of the flow of information, working with advertisers and publishers, editing, proofing, and coordinating distribution.
Knowledge Management Contact: km@apmpnca.org	Responsible for collecting data and providing solutions that improve Knowledge Management (KM) policies and processes and make for a better experience for the NCA member. This includes making knowledge and information accessible to current members, non-members (or future members), and other APMP chapters. ***Jobs include:*** Managing the asset library inventory, presentation, and organization; planning for material reuse; ensuring content provides educational value to our members; and developing policies for usability and knowledge management.

Committee	Committee Objectives
Marketing and Publicity Contact: publicity@apmpnca.org	Plans and manages campaigns to promote and gain exposure for our organization, its events, resources, and member benefits. The objective is increase visibility and awareness of APMP and the NCA Chapter to the bid and proposals community, attract members to the organization, and increase participation in Chapter activities. ***Jobs include:*** Formatting promotional materials/messages; managing content/promotional messaging on the web site, social medial, and email campaigns; and sending out communications like 5 Fact Friday.
Membership Contact: membership@apmpnca.org	Develops and implements an action plan for membership development. Developing our membership requires both recruitment and retention. The committee helps members navigate the membership registration process on the apmp.org website. They perform outreach at events with a membership table. They reach out to members to ensure their goals are being met. ***Jobs include:*** Corporate outreach, member recruiting, new member follow-up, cross-chapter liaison, event support, administrative support, metrics capture, membership records management, and other recruitment/retention initiatives.
Mentorship/Professional Development Contact: prodev@apmpnca.org	Develops programs to support professional development. This includes the mentorship program, scholarship programs, and other special education opportunities. The committee create activities to further the APMP certification program; It coordinates with the APMP Education Chair, the Certification Chair, and other chapters as necessary to remain current on education and certification initiatives in our industry, to share our professional development successes, to capture insights from those entities, and to collectively develop new ideas and initiatives to promote professional development. ***Jobs include:*** Soliciting, matching, and supporting the mentor-protégé partners; planning joint mentoring events; planning and coordinating other trainings initiatives; tracking member certifications and CEUs; and assigning and publicizing CUEs earned for event/activity participation.
Speaker Series Contact: speakerseries@apmpnca.org	Plans a calendar of speaker/educational events, including topics, moderators and speakers. ***Jobs include:*** Identifying moderators and speakers, preparing program planners, collecting bios and releases, supporting speakers in preparing their presentations; coordinating dry runs prior to each event (as appropriate); supporting publicity, registration; exploring ways to capture member satisfaction and improvement strategies.
Special Events Contact: events@apmpnca.org	Plans and manages special networking and education events for the Chapter. ***Jobs include:*** Planning events that complement the Speaker Series and annual conference; conceiving, planning and delivering networking events and programs targeted to segments of the membership, e.g., by job (BD, capture, proposals), geography (DC, MD, VA), format (virtual, breakfast, lunch, dinner), or customer ('Federal', commercial); and identifying new ways to provide member value, such as webinars, happy hours, socials, or job search/match events.
Technology Contact: technology@apmpnca.org	Responsible for identification of technologies that improve the management, storage and presentation of Chapter information, promotion, and communication. The Technology Committee manages the APMP-NCA website architecture, the Chapter email, our Privia library of Chapter corporate assets, conferencing and video technologies, and is continually investigating new ways to support the Chapter through technology. ***Jobs include:*** Analyzing, testing and selecting new technologies for the Chapter; maintaining the Chapter website; serving as system administrator for tools such as Privia and our Chapter groups and pages in LinkedIn, Twitter and Facebook.

Maryann Lesnick, CP APMP, PMP, CSM - Principal Consultant with Lohfeld Consulting Group, has more than 30 years of technical, management, and BD experience. Currently the APMP-NCA Chapter President, Maryann served as the 2012 and 2013 Vice President, as the APMP-NCA 2011 Logistics Chair, and on the APMP-NCA Boot Camp Committee for three years (2008, 2009, 2010), serving as Boot Camp Chair 2010. Maryann is a Practitioner Level APMP certification mentor, an ACT-IAC Fellow, a CMMI Level 2 Internal Assessor, ISO 9000 Internal Auditor, certified Microsoft Office Specialist (MOS), and holds a BS in Mathematics and Master's Degree in Interdisciplinary Studies. mlesnick@lohfeldconsulting.com

APMP-NCA Board of Directors Meetings are Open to Members

The Board of Directors for APMP-NCA meets the first Tuesday of every month. Two out of every three meetings are virtual meetings. 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

Sareesh Rawat
ezine@apmpnca.org
301-523-5157

Editors

Maryann Lesnick, CPP APMP
APMP-NCA President
mlesnick@lohfeldconsulting.com

Lisa Pafe, CPP APMP
APMP-NCA Vice President
lpafe@lohfeldconsulting.com

Layout and Graphics

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

Sr. Graphic Designer

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

Circulation

Tom Skrobacz
tom@diamond-wall.com

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