



# EXECUTIVE summary

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This Issue's Theme: **Leadership and Professional Development**

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# Leadership and Professional Development

by Rebecca Link, APMP-NCA Chapter President

This has been a busy quarter for our local APMP chapter and even busier for APMP International as they prepared for their annual Bid and Proposal Conference held in San Diego. Out of the many themes that the conference offered to its attendees, one stood out to me as significantly important and valuable. Leadership and Professional Development are two of the most important areas that we as proposal professionals need to focus on. For those of us on the front lines and leading teams of people, we must constantly evolve and change our leadership styles to meet the needs of our internal customers.

Each team is different. What motivates one person may restrict another. When you push a team too hard, sometimes they push back. So, how do you get people to WANT to work for you? Here are a few skills and tactics that I employ to foster teamwork and keep the train on the tracks.

## 1. **Have open communication.**

Something that is very important to me is how comfortable my team feels working with me. This can take time to establish, but one thing that I do to begin to build that rapport is to make sure that I am responsive—answering emails promptly, helping writers to find content, checking in on the team, having regular status calls, and offering assistance all the time. I have my emails come to my phone

so I never miss a communication. I also encourage people to call me, at my desk or on my cell, if they need to get in touch with me. This sometimes means texting with a teammate at 8:00 p.m. or a Saturday afternoon! If I want my team to work for me, I have to be willing to work for them.

2. **Praise people often.** VPs, experts, co-workers, sometimes all it takes is a simple, “Hey, you are really doing a great job with this!” to brighten someone’s day and get them out of a funk they may have been creeping into. I go the extra yard to say specifically what they have done well. Instead of, “You are doing great,” I say something like, “I really liked how you weaved in the customer quote to give credence to your claim.” This shows that I spent the time reading their work, which goes a long way. Proposals are stressful work, and many of the people who work on them have day jobs, too!! Let them know that you see the hard work they are putting in and that you’ve got their back, and they will continue to crank out the good stuff and meet your deadlines, too!

3. **Be overly organized.** Make sure that you have spelled everything out for the team and that there are no surprises (that are in your control!). The government may issue amendments or change

due dates, or subcontractors may cause headaches. Those are things you can’t control, but they can rattle your team. By making sure that all your ducks are in a row as a proposal manager/coordinator, you are able to at least give the team a sense of stability with your process. Ensure that your kickoff slides are robust. If someone needs to get a POC, they can find it in the slides. Forget which day Red Team is on? Check the slides. Want to see an outline of the tech volume? SLIDES. Having one place the whole team can go to reference information about expectations and process is invaluable (and can limit the amount of emails that they send you with questions!). There are many tools out there that companies use to create that one space where writers can find everything, whether it’s Privia, SharePoint, or VPC as examples. Also make sure to have plenty of artifacts to support you and the team. If it is a hard copy submission, create a production checklist so you know what needs to be done. If there are a bunch of resumes, consider a personnel matrix so you can ensure that the people you are bidding meet the qualifications.

The other topic of importance to me is Professional Development. For many of us, we have completed the programs and degrees that we had strived for and are

## Leadership and Professional Development!

no longer “students”. Perhaps some of us are still working toward that degree. The fact of the matter is, there comes a time when those chapters are behind us and we are established in our careers. So, what then? I am a firm believer in continuing growth and education. My father, who was 81 at the time, said to me one day *“You know what, Bec? There is not a day that goes by that I don’t learn something new.”* This has stuck with me and continues to be a goal that I strive for in my daily life.

When applied to our careers, we begin to look at the opportunities that are available and that can enable us to reach new heights, get promotions, grow our networks, and broaden our skill sets. We are fortunate to be in the second largest APMP chapter in the world. Because of this, the opportunities that are given to our members are much greater than that in other areas. In our chapter, members can take advantage of a totally free program we offer called the Mentor-Protégé Program. Every year we allow members to submit their applications to be either a mentor or a protégé. Pairs are carefully selected based on geography, experience, and interests. This mutually beneficial offering allows the paired individuals to design a plan to meet goals throughout the year and get support from the chapter in accomplishing them. Quarterly dinners are held to discuss progress, and mentors are given stipends to assist with any materials or meetings needed. It truly is a win-win for everyone who participates. Additionally, our chapter offers a number of free webinars throughout the year on a variety of topics to support our members’ development.

Another great opportunity that is specific to our profession is the ability to obtain certifications in our field. Once we are finished with schooling, many people choose to become certified in their fields of expertise. In APMP, there are three levels of certification that professionals can complete. The Foundation Level certification covers basic principles and is administered in a 75-question multiple choice test. This test can also be administered at the end of a training class if you are not a fan of self-studying! The Practitioner Level certification is a bit more involved and requires the individual to write short answer essays describing the process for which they complete their work as a proposal professional. The third and final level, the Professional Level, consists of a face-to-face interview by a panel providing verbal, real-time responses to questions that are asked of you about your career. Other certification options for those in our industry can be the Project Management Professional certification offered by the Project Management Institute, which can help you to learn how to manage time on projects and how to meet all your project goals. Potentially beneficial, ITIL Certification can offer benefits such as understanding of lifecycle stages and service management practices.

Finally, regarding Professional Development, I recommend networking. This can be as simple as growing your LinkedIn profile to All Star status or can mean joining groups and clubs where you can get involved or meet new people. Giving back to the professional industry can help others learn your

name, see your work in action, and open the door for feedback and communication. Learning from those around you and collaborating in different environments fosters the ability for an individual to become a multifunctional, cross-trained professional, which is not only personally rewarding because it can open new doors, but also makes you a valuable asset to any company you work for.

Regardless of whether you are a young professional or a “seasoned veteran”, maintaining a presence in the industry, committing to growth and development, and becoming a strong, positive leader will pave the way to accomplishments for years to come and might give someone else the motivation to join you along the way.

Yours in success,

Rebecca Link

Rebecca Link, CF APMP, Sr. Proposal Manager, American Systems. Prior to joining the industry, Rebecca completed her Master’s degree in Public Administrations. She has served on the Board of Directors for the NCA Chapter for two years. In 2017, she received the award for “Up and Coming Board Member” and was named one of APMP International’s top 40 Under 40. A member of APMP for six years, Rebecca has her Foundation Level Certification.

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upcoming  
events!**



# What Do You Want to Be When You Grow Up?

by H el ene Courard, APMP-NCA Vice President, JD, CF APMP Fellow

As a proposal professional, it should come as no surprise that I believe the approach to one's career development should be driven in the same way as proposal development. Just as you would never start writing a proposal without having developed a proposal development plan and associated outlines, you cannot expect to reach your professional goals without putting some thought into defining what your goals are and determining what steps you need to take to get there. But, unlike a proposal where the objectives are provided to you by the client, when it comes to your career, you are responsible for defining what you want to be when you grow up.

So, how do you figure out where you want to go with your career? This is the standard "Where do you want to be in three, five, and 10 years?" Question. While some people have a very clear long-term vision (*e.g., I want to be a director of a large proposal organization in 10 years, or I want to progress from proposal coordinator, to proposal manager, to capture manager in 15 years*), it is more likely that you don't know where you want to be in the 10- to 20-year timeframe. If we are honest, most of us in the proposal industry did not begin our careers even knowing this industry existed, much less with a specific goal in mind.

For those of you who know my background (or have read my bio), you'll note that I have my law degree.



I practiced telecommunications law for five years before I switched careers and "fell" into the proposal industry. I went to law school for many reasons, including (in no particular order) (1) I loved school, and I was good at it; (2) I loved (and still love) precise language and a well-crafted, exact argument; and (3) as a naturalized U.S. citizen, I am passionate about the constitution and the principles upon which this country was founded. After five years in the trenches, though, I realized that while I love the law, I am decidedly not fond of the law firm 80-100+ hour workweek lifestyle.

I didn't know what I wanted to do—or what I was qualified to do. With the help of a fantastic career coach, I was able to determine that the skills and abilities I loved about my legal career were very similar to those needed in proposal development<sup>[1]</sup>. Voila! Another

[1] Well, program management to start, but proposal support was part of the job respon-

proposal wonk was born! Seriously though, it took about six months of intense research and introspection to find my new path. Through this experience, I found that the absolutely best way to determine your career goals is via a lot of informational interviewing. Informational interviewing is simply the process of interviewing a lot of people in various jobs or fields that seem interesting to you to determine whether it is a career path you would find fulfilling and can be successful in. Why does it work? People like to talk about themselves. And they love when someone shows an interest their personal career path.

The key to informational interviewing is that you are not interviewing for a

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sibilities because the program I was supporting was entering a series of key recompetes. Within six months most of my time was spent as Book Boss on the first of these recompetes, and within a year I was working New Business Development for the division. The rest is proposal history.



particular job, you are just exploring the career. This removes a lot of pressure on both sides of the discussion. The person you are speaking with is more willing to meet with you and is more open about the realities of the field because you are not asking for a job. Meanwhile, I was free to ask a lot of questions I wouldn't normally ask in a job interview when I would be more focused on trying to make a good impression. Instead I could be direct to explore what the field was about—the good, bad, and ugly—because I was on equal footing; simply assessing whether the role would be a good fit for me.

### *So how do you do it?*

- **Identify people in your network**—including colleagues, leaders in your firm, people you meet in the course of your job from other companies, or people you meet in your professional networks like APMP or school alumni groups. Reach out to them and ask them if they wouldn't mind giving

you 30 minutes of their time to talk about what they do and how they got there.

- **Ask some basic, routine questions**—What is a typical day like for them? What part of their job is really fulfilling? What are some of the drawbacks? What was their path into that role? What skills do they think are essential for developing into a successful [fill-in-the-blank]?
- **Network, network, network**—The last question I would ask everyone I spoke with was whether they could connect me with one or two other people in a similar field who they thought I should also talk with. This was invaluable in exploring complementary fields in an industry as well as in growing my network. I am still in touch today with some of the folks I met on that journey. Today, nearly 20 years later, I can reach out to a vast network of people in a diverse set of industries that gives

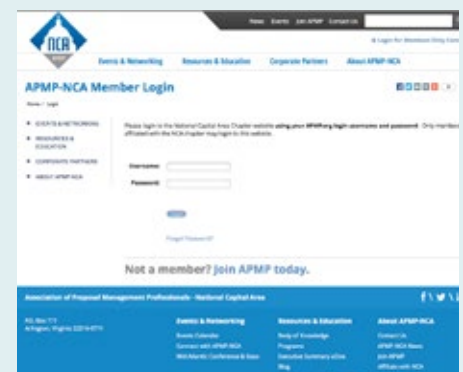
me perspective on the interrelatedness of so many exciting fields.

Of course, my career change and subsequent growth in this industry requires a lot of research and introspection. It is critical to understand what feeds me and drains me, where my strengths lie, what my weaknesses are, and how to overcome them or minimize their effects. However, I still use informational interviewing today as I evaluate my next steps on my career path. By far, informational interviewing has been the most effective tool in my professional development.

With more than 20 years' experience leading and motivating teams to success, H el ene has been engaged with APMP-NCA since 2007. She has chaired several committees, mentored junior members through the NCA Mentor-Prot eg e program, and is currently serving as NCA's Vice President. She is the Director of Unisys Corporation's Global Proposal Center, leading a team of more than 30 professionals in the preparation and delivery of winning proposals worldwide for national, state, local, and commercial clients. She holds a BA from Saint Joseph's University, and JD from Santa Clara University School of Law, and is an APMP Fellow.

## APMP-NCA Members!

When was the last time that you logged into [apmp.org](http://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.





# Where Can I Go To Get Free or Low-Cost Graphics?

by Mike Parkinson, CPP APMP Fellow

I have the honor of teaching graphics, PowerPoint, and solutioning around the world. In my workshops, participants and I share our favorite free and low-cost stock image websites. The following is a list I compiled from recommendations and from my experience with the sites.

	Photographs	Infographics	Quantitative Graphics	Symbols and Icons	Cost
Pexels.com	✓				Free
FreePik.com	✓	✓	✓	✓	Free
MMTstock.com	✓				Free
FreeRangeStock.com	✓				Free
FlatIcon.com				✓	Free
TheNounProject.com				✓	Low
iStockPhoto.com	✓	✓	✓	✓	Low
DreamsTime.com	✓	✓	✓	✓	Low
Shutterstock.com	✓	✓	✓	✓	Low
BigStockPhoto.com	✓	✓	✓	✓	Low
ThinkStockPhotos.com	✓	✓	✓	✓	Low
Stock.Adobe.com	✓	✓	✓	✓	Low
GetMyGraphics.com*	✓	✓	✓	✓	Low
PresentationLoad.com*	✓	✓	✓	✓	Low
SlideShop.com*	✓	✓	✓	✓	Low

\*Includes PowerPoint graphic files.

To save time and money and to ensure that there are no potential copyright issues, use a low-priced stock image website instead of a free site. Finding the *perfect imagery fast* is key for me because time is money. The more time I spend searching for what I need, the more money is “spent” on that graphic. Traditional fee-based sites contain a better selection of professional content and offer worry-free usage rights.

There are amazing free graphic sites. However, the image selection on free websites is relatively limited, and the rights do not always accommodate commercial use. Additionally, free sites are often linked to fee-based websites. When I find the perfect picture, I may be required to pay because it is offered through a partner, which defeats the purpose of using this time to search

## Where Can I Go To Get Free or Low-Cost Graphics

through the free resource. I sometimes start with a free site that I trust and, if I don't quickly find what I'm looking for, switch to a traditional stock image site.

Do you have a favorite website for images, videos, sound files, PowerPoint, or other assets you use in presentations and marketing materials? Please share, and I'll make it available to help others.

Thank you and good luck!

The more time I spend searching for what I need, the more money is "spent" on that graphic.

Mike Parkinson, Microsoft PowerPoint MVP (1 of 13 in U.S.) and CPP APMP Fellow, is an internationally recognized visual communications, solutioning, and proposal expert. He is also a professional trainer and award-winning author. He is a partner at 24 Hour Company ([24hrco.com](http://24hrco.com)). His Billion Dollar Graphics book and website ([BillionDollarGraphics.com](http://BillionDollarGraphics.com)) share best practices and helpful tools with professionals. Contact Mike at [mike@24hrco.com](mailto:mike@24hrco.com) or call 703-533-7209.

## Membership Tip:

Go to My Profile on the APMP website, log in, and click the Bio tab for the following information:

- Your APMP membership number
- Chapter affiliation
- Latest certification
- Certification number
- Certification date





# Proposal Manager: From Good to Great

by Lisa Pafe, CPP APMP Fellow, PMP

At the 2017 APMP Bid and Proposal Con, my colleague and I facilitated a workshop on [Proposal Manager: From Good to Great](#). Our findings and audience feedback confirmed that Proposal Managers of any merit continually strive to improve their abilities. This article examines the research on going from good to great, specific guidance for Proposal Managers, and impacts on your career.

## Good to Great

Good managers are competent. They direct a group in following already established processes and policies. Great managers set a new direction or vision for a group; in other words, they become leaders. How does a manager rise to greatness? Research indicates it's a combination of practice gained through experience as well as education, temperament, talent, and engagement. A study published in the [Harvard Business Review](#) found seven "seismic shifts" from good to great:

1. Specialist to Generalist
2. Analyst to Integrator
3. Tactician to Strategist
4. Bricklayer to Architect
5. Problem Solver to Agenda Setter
6. Warrior to Diplomat
7. Supporting Cast Member to Lead Role.

The article concluded that these are a tricky set of changes that require refocusing both effort and skills. For the Proposal Manager, going from good to great is truly a seismic shift in attitude and action.

## Guidance for Proposal Managers

Effective Proposal Managers don't just follow a process, they become engaged at every step. They work closely with the business development (BD), Capture, Solutioning, and Pricing teams to develop winning solutions in a collaborative manner. They get involved very early in the BD life cycle, building trusted relationships and thoroughly understanding requirements, rather than waiting for the RFP to drop. A great Proposal Manager is therefore proactive rather than reactive.

A great Proposal Manager is also a critical thinker. It is in the handoff from Capture to Proposals that many proposal efforts fail. If the Proposal Manager is involved early in facilitating iterative solutioning as well as assessing results to ensure that the solution has a discriminating value proposition, then the handoff is much smoother. Proposal Managers who are both proactive and analytic lead the team to a well-articulated solution that they then map to the evaluation criteria and work requirements. Of course, capture plays a key role here in that they must understand what the customer values and must make sure that the discriminating

Good managers are competent. They direct a group in following already established processes and policies. Great managers set a new direction or vision for a group; in other words, they become leaders.

value proposition reflects the voice of the customer.

Once the proposal writing and reviewing begins, a great Proposal Manager checks the work in Agile iterations, asking probing questions about draft content, offering suggested fixes, and keeping the team on schedule and on track with the value proposition. A great Proposal Manager does not simply receive inputs and passively copy these into the master proposal template. They read and critically assess the inputs beyond compliance.

- Does the solution include clearly defined features, benefits, and proofs?
- When elements of the solution exceed requirements and/or significantly reduce risks, does the proposal express these as strengths?



## Proposal Manager: From Good to Great

- Are there weaknesses, deficiencies, or risks that need to be mitigated and/or gaps that need to be filled?
- Are there discriminating strengths clearly expressed as a value proposition that the customer values?

A great Proposal Manager is not a passive spectator but a driving force, questioning everything. The best Proposal Managers are unafraid to assertively take action and to possibly not be liked as a result. Being respected is more important.

A great Proposal Manager also takes the lead on lessons learned:

- What worked well, and what did not work well?
- Which proposal participants added value, and which did not?
- What changes must be made to improve processes, create better proposal teams, and increase win probability?

Once the customer provides the debrief, win or lose, a great Proposal Manager assesses the information provided. The major focal point of the analysis is understanding what the customer valued. If the offer contained discriminating strengths, did the customer recognize these? If not, was it because the value proposition was not properly articulated, or was it because we misunderstood the customer's requirements, hot buttons, objectives, and/or risk aversion level? A great Proposal Manager incorporates this information into the feedback and continuous improvement loop for the next bid.

### Impacts on Your Career

In his bestselling book, *Good to Great*,

Jim Collins states that companies on the road to greatness make a To-Do List and a Stop Doing List. The same applies to your role as Proposal Manager. If your role is primarily administrative (sending meeting invites, creating calendars, holding status calls, coordinating inputs, ordering food for the war room), then you need to add these items to the Stop Doing List. Many good Proposal Managers fall into the trap of serving as a coordinator, and the more you act in this role, the less likely you are to be great.

What should be on your To-Do List? I recommend the following:

- Take advantage of training and educational opportunities whenever you can—not just in proposal management, but in capture, writing, graphics, competitive intelligence, Price to Win, and more.
- Achieve certifications—not just APMP, but other appropriate certifications, which may include PMI PMP, ITIL, Agile, and the like.
- Participate in associations—most definitely APMP at the International and local levels, but also consider participating in other professional organizations that can help you network and build your knowledge base.
- Insert yourself into all phases of the business development life cycle once an opportunity is identified and qualified. A great Proposal Manager is involved in capture, competitive intelligence, solutioning, pricing, writing, reviewing, and lessons learned. Remember, you are not becoming a specialist in these, but

at the least a generalist, and serving as facilitator and critic as needed.

- Find mentors—connect with a great Proposal Manager who can give you both positive feedback and constructive criticism as well as mentors for other aspects of your job such as leadership and supervision.
- Contribute to thought leadership. A great Proposal Manager participates in our profession by writing articles, participating in social media discussions, and presenting at conferences.

Another concept from Collins' book that is very applicable to our profession is the Hedgehog Concept: you only achieve greatness at the *intersection* of passion, talent, and appropriate compensation. Your employer should reward your demonstrated love for your work and your innate and learned gifts with fitting salary, benefits, bonuses, and promotions. You must be your own best advocate, making sure that your value is appreciated and compensated.

A great Proposal Manager has innate talent and temperament but uses these as a springboard for reaching greatness. Be honest with yourself. Do you have what it takes to be great? If so, take immediate action to make the seismic shift.

Lisa Pafe, Vice President (VP) at Lohfeld Consulting Group, CPP APMP Fellow and PMP, has 25+ years' capture and proposal experience. She served as President of the APMP-National Capital Area (NCA) Chapter, VP and Speaker Series Chair for two years each. She holds a BA from Yale University, MPP from Harvard University, and MIS from The George Washington University. She is a frequent guest writer for Washington Technology and a LinkedIn Publisher.



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# Career Tools: Mentor, Advocate, Or?

by Tara Rethore, CEO of M. Beacon Enterprises LLC

**M**entorship is a fairly common tool for professional development, as part of both formal mentoring programs (e.g., [APMP-NCA's Mentor-Protégé Program](#)) and self-initiated personal development plans. An [effective mentor](#) is usually a more experienced person who guides someone along her/his professional journey based on her/his experiences and ability to model positive behaviors. Mentors can be helpful at just about any point in one's career and often are part of the same organization or working in a similar discipline. They've learned the rules of the road and share them with less experienced staff. Awesome.

## *Yet, is a mentor enough?*

Mentors can be fabulous for building skills and navigating organizational and professional pathways. Advancing your career needs something else. Of course, you must master your work, get along with colleagues and customers, and do what you say you will do. Delivering results consistently and with integrity remains a critical factor in advancing your career. Yet, no matter how good you are and how well your results speak for you, neither is sufficient if you and your results are not apparent to others.

## *Enter the advocate.*

Oxford defines [mentor](#) as “an experienced and trusted [advisor](#).” By contrast, an advocate is “a person who puts [forth] a case on someone else's



behalf.” A mentor's job depends entirely on you—the path you are taking and the skills you will (or must) develop—guiding you along the way. Similarly, an advocate understands who you are, including your core competences and the path you are taking. However, an advocate not only understands your potential, but also actively *promotes* your skills. (S)he sings your praises to a broad audience, often seeing opportunities for which you are an excellent candidate, ahead of others, including (in my experience) yourself. An advocate brings your core competences into the light and may even put them together in unexpected ways. Together, you create specific opportunities to advance your career.

Anecdotally, it seems that people have just one or two mentors at any given time. On the other hand, you

want many advocates, both within your current field or organization and externally. Perhaps your current boss is an advocate; great—now cast the net wider. Then, cultivate those advocates, even when you find them almost by accident. Help them to help you.

Four things to consider when seeking an advocate:

1. **Respect is paramount.** An internal advocate should be a trusted and respected member of the organization. An external advocate must be respected more broadly; (s)he is known in his/her field. Note: “most respected” does not always equate to “most senior”. Unfortunately, most of us will have encountered that senior leader for whom few want to work; (s)he is not a good choice to be your advocate!



2. **The best advocate is a “connector”.** That’s someone who naturally and willingly brings people and ideas together, often in ways that neither expected. (S)he can see the value each of you offers and broadly, for what purpose. In connecting you, your advocate typically highlights your competences and the opportunity you create for the other person.

3. **Subtlety may be your friend.** Generally, we are more direct about engaging mentors; we accept an invitation to a formal program, encourage someone to participate, or ask someone directly: “Will you be my mentor?” By contrast, it is less common (or comfortable, perhaps) to ask someone to be your advocate. Sometimes, it is a question of awareness—who seems to be outspoken on your behalf and in what circumstances or circles? Be sure they know what your career interests and aspirations are. Listen to what they say about you to others.

4. **Look for the Hi-Pros.** High-performing professionals (rather than high-potential candidates,

Hi-Pos) are the backbone of every organization. They are the folks who consistently get it done, have the requisite expertise, and are counted on to deliver. In my experience, Hi-Pros enjoy a non-linear approach to career-building, often seeking challenge and growth via different, varied paths. Their recommendations often carry great weight, and their influence may extend well beyond their current team. Conversely, Hi-Pos may be seen as rapidly going places—on the fast track. But it can be a mistake to hang your star solely on one or two Hi-Po advocates who may have positional authority. Hi-Pros are leaders, too, with or without the more obvious power of position.

In my view, a mentor can also be an advocate (and vice versa); it depends entirely on the role you’ve asked the person (and (s)he has agreed) to play. What’s important is that you have both advocates and mentors in your corner—and that you are actively working with both. After all, it is your career.

By the way, as you actively engage mentors and advocates for yourself, be sure

to do the same for others. Consider not only what kind of advocate you want, but also, what kind of advocate you want to be.

“...an advocate not only understands your potential, but also actively promotes your skills.”

*Managing strategy well includes constant feedback. Follow our story and share your tips via LinkedIn, on Twitter, or by email. The author also published a version of this article on LinkedIn, 2/23/2018.*

Tara Rethore is CEO of M. Beacon Enterprises LLC, a strategy development and execution consulting firm. We work collaboratively with individuals and organizations to ensure that the results solve problems in a way that makes sense for each business. We call this approach Strategy for realTM. To every engagement, we also bring a solid foundation in leadership and team dynamics. Learn more at [www.mbeaconenterprises.com](http://www.mbeaconenterprises.com).

## Proposal Tip...

Keep graphics simple and uncomplicated to have more impact for the reviewers.



# Is Consulting Your Next Best Career Move?

by Chris Simmons, Founder and Principal, Rainmakerz Consulting LLC

*This is the first in a multi-part series of articles on the pros and cons of a career in BD/Proposal consulting. This article explores the benefits consulting has to offer and the rationale for considering a consulting career.*

One of the most common challenges consistently identified by professionals in our industry is the lack of available and qualified resources to do the job. In a survey published in the APMP Journal (The Big Proposal Management Study, Spring/Summer, 2009), 66 percent of the respondents cited “lack of resources” as their biggest challenge. The second biggest challenge? “Not enough time” (56 percent). There has been, and continues to be, a significant need for consulting resources to help business development organizations win more and work less.

If you are reading this article you might feel bored with your current job, don't feel appreciated, are not fairly compensated, are looking for a change, or perhaps even lost your job. Perhaps you think a consulting career is the answer. Consulting could be the logical next step. But is a career in consulting

The demand for experienced and skilled capture and proposal professionals has never had more potential for growth.



the right path (and is it the right time) for you?

## What's a consultant?

Before you decide on a potentially life-changing decision, it's important to understand what a consultant is. A consultant can be an independent contractor, a freelancer, a self-employed sole proprietor, or a 1099 employee.

In the *2017 APMP U.S. Compensation Report*, APMP describes “Proposal/Business Development Consultants” as follows:

- “Independent contractors or people who work for proposal consulting companies”
- “Provide companies with additional options for resources across all BD functions”

- “Job functions vary from leadership of engagements to assisting in surge situations”
- “Role may also include contributions to supporting a client's BD capabilities in the areas of gap analysis, process development, and leadership coaching”

## The demand for consultants is high.

Whatever you call them, consultants are all around us. They are entrepreneurs and they make the economy tick. According to MBO Partners (State of Independence in America, 2015), the number of independent contractors will grow to a staggering 54 million by 2020. A study by Intuit, Inc. (TurboTax and QuickBooks) predicts that 40 percent of American workers will be independent contractors in the next



two years. The demand for experienced and skilled capture and proposal professionals has never had more potential for growth. The so-called gig economy has arrived—fueled by technologies that enable an increasingly mobile workforce. Freelancing consultants are in high demand for temporary positions (“gigs”). And companies are seeking to create larger pools of resources than are otherwise available in their brick and mortar locations.

Companies competing for strategic advantages in growth or highly competitive markets are increasingly seeking outside assistance. Consultants can provide a quick and easy way to provide surge support, conduct independent third-party assessments, or contribute to “must-win” opportunities. Need a fresh perspective or a dose of industry best practice? Experts recommend hiring a consultant to introduce and/or refine your processes, tools, and templates.

In addition to the current gig economy forecasts, the success of business development, capture, and proposal management consulting companies, especially in our area, is booming. There is no doubt that significant consulting opportunities exist for those who are willing to explore the possibilities of a consulting career.

### **The benefits of a consulting career can be great.**

The benefits of a career in consulting are well-established. Here are my top five:

1. Employment...plain and simple
2. Being your own boss

3. Opening the door to new opportunities
4. Flexibility to work when you want
5. Improving your earning potential

#### ***Employment...plain and simple.***

For many of us, the decision to become a consultant is one of survival. In times of economic downturn, when layoffs and unemployment are high, many job seekers join the consulting world once they are not able to secure full-time employment. Starting a consulting career in these cases can simply be a last resort and a matter of economic necessity. This is a fairly common circumstance and how I started my proposal/BD consulting career after a surprise lay off by Deloitte Consulting. According to MBO Partners (The State of Boomer Independents, 2012), 23 percent of those surveyed chose a consulting career after losing their job.

#### ***Being your own boss.***

The independence and freedom of being your own boss is a big attraction for many of us. This is especially true if your current boss takes the credit for your successes and blames you for their failures. Setting your own goals and identifying your day-to-day priorities is a dream. Having to re-negotiate for your well-earned bonus, navigating corporate politics, or avoiding personality clashes with your boss can be a nightmare.

#### ***Opening the door to new opportunities.***

Doing the same thing, over and over again, can lead to boredom, motivational issues, and even lower self-esteem.

This is especially true for us overachievers who want more from a job than just a paycheck. A proposal consulting career provides more opportunities to work with different companies, different people, different products/services, different processes and tools, and at different locations. As a consultant, you have the flexibility to pick and choose what you want to do. You increase the variety of your work. You can expand your comfort zone, explore new areas of interest, and learn new skills as opportunities arise. This form of empowerment has a direct and significant impact on your job satisfaction and even your self-worth. If the consulting career path is a temporary employment bridge for you, getting exposure to other companies that might be future employers isn't a bad thing either.

#### ***Flexibility to work when you want.***

BD/Proposal consulting opportunities are typically milestone based. Your deliverables are due in hours, days, or months. Work/life balance takes on new meaning. You can choose when you want to work and how hard you want to work. You can work 60-hour weeks for a few months and take the summer off to be with your family. Want to go to all your daughter's soccer games during the week? Burn the midnight oil the night before to meet your later morning deliverable and take the rest of the day off. Don't want to retire cold turkey? Scale back your consulting assignments to 20-hour/weeks. Contribute in different ways and stay active by shifting from a full-time proposal manager role to part-time writer, reviewer, or editor roles.

***Improving your earning potential.***

The bottom-line for most consulting candidates is that they can make more money than their W-2 counterparts. BD/Proposal consultant rates are often in the \$100-200/hour range. Even working part-time at these rates generates a healthy six-figure salary. When you set your rates, your financial destiny is under your control.

**Is the timing right for you?**

Perhaps you're convinced that a BD/Proposal consulting career is the best path for you. Despite the compelling benefits, many would-be consultants decide consulting is not right for them. The next part of this series explores some of the reasons why a consulting career is not for everyone.

Chris Simmons CP APMP Fellow, is a former vice president of the APMP National Capital Area Chapter, award-winning contributor to both the APMP Journal and the NCA eZine, and NCA Mentor of the Year. He is also the founder and principal member of Rainmakerz Consulting—a business development solutions company helping more than 200 customers win billions in new business revenue. If you want to learn more about the benefits of BD/Proposal consulting, contact Chris at [chris@rainmakerz.biz](mailto:chris@rainmakerz.biz), 202.255.2355, or visit [www.rainmakerz.biz](http://www.rainmakerz.biz).

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## APMP-NCA Member Appreciation Event Recap

The Annual APMP-NCA Member Appreciation Event was held on April 19th. The event took place at The Auld Shebeen in Fairfax. Members enjoyed appetizers, dinner, and drinks. The event also included trivia, hosted by Team Trivia, with prizes for the top three teams. Members received a swag bag that included items from our Partners. There was also a Raffle that took place with prizes, including coffee mugs with Starbuck gift cards, gift cards for Amazon, and VisibleThread Software certificates!

In addition to the food and fun, Member Awards were presented to the following APMP-NCA members:

- Most Valuable APMP-NCA Member: David M. Stearman
- Best eZine Article: Absence Makes the PWin Fonder by Lisa Shea Mundt, CF APMP
- Mentor/Protégé Shining Star: Debi McGhee and Samantha Love, CF APMP
- 2017 Up and Coming Board Member: Nicole Tripodi, CF APMP
- Attendance Award: Tim O'Connor
- Corporate Partner of the Year: AOC Key Solutions
- Special Recognition: Eric Shwarz and Anne Pyne



**A big THANK YOU to the Partners who donated to the swag bags and the raffle!**

# APMP-NCA MAC Sponsorship Opportunities

Do you want to get your business name in front of hundreds of business professionals in just one day? Do you want to promote a product or service to bid and proposal professionals from dozens of different organizations? Then you should consider being a sponsor for APMP-NCA's annual Mid-Atlantic Conference & Expo, scheduled for October 2018. Below are some of the opportunities available.



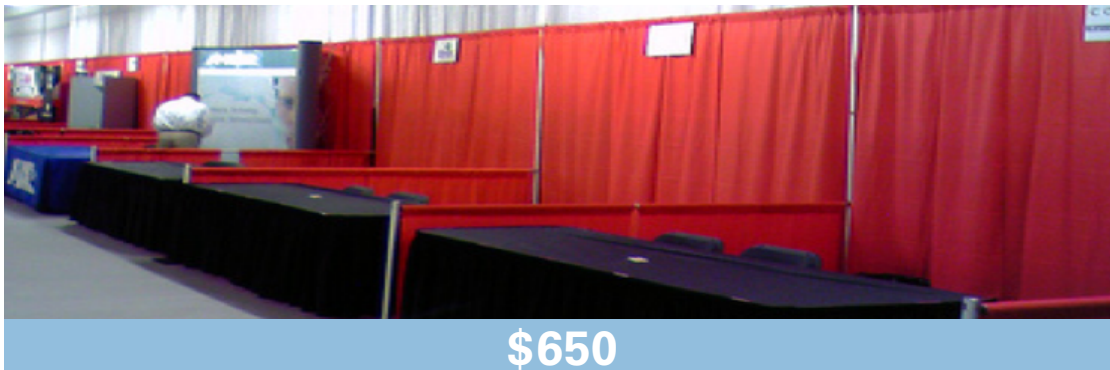
**Sponsor a Presentation Room**  
You choose the room name with acknowledgment at the conference, on our website, and in the mobile app/program.

**\$500**



**Sponsor Breakfast or Lunch**  
Display your logo at breakfast and on the tables. Receive an acknowledgment on our website and in the mobile app/ program.

**\$500**



**Vendor Booth Display (for non-Corporate Partners)**  
Receive individual table space for your company to display information about your services to all attendees. Price includes one free registration, valued at more than \$200.

**\$650**



**Reusable Bags with Logo**  
Provide each attendee with a reusable bag printed with your logo and company information. Your cost is only the cost of the item provided.



**Sponsor a Charging Station**  
Display your logo at the phone charging station and receive acknowledgment on our website and in the mobile app/program.

**\$325**

These and other opportunities are available. Some of these opportunities go quickly, so don't delay! For more information, send an email to [partners@apmpnca.org](mailto:partners@apmpnca.org).



# APMP Certification

by Maryann Lesnick, CPP APMP, PMP, CSM

**A**PMP Certification is the global standard for developing and demonstrating proposal management competency, offering the world’s only industry-recognized certification program for bid and proposal professionals. If you are pursuing a career in proposal management, you should obtain and maintain at least a Foundation Level Certification; it is even becoming a requirement for some employers.

An APMP Certification demonstrates personal commitment to your career and profession. It demonstrates your business development capabilities and skill sets; creates a focus on best practices; and fosters respect and credibility among peers, clients, organizational leaders, and prospective employers.

APMP Certification reinforces bid and proposal management as an important role in an organization.

An APMP Certification demonstrates personal commitment to your career and profession.

## APM Group

The APMP Certification program is administered by The APM Group Ltd. for APMP. The APM Group is a leading Accreditation, Certification, and Qualification organization recognized internationally by government agencies. The Certification Program is defined in the [APMP Certification Program Syllabus](#).



9,000+ members worldwide  
449 NCA members  
1 year experience

CF APMP

Basic Knowledge of Best Practices



900+ members worldwide  
61 NCA Members  
3 years experience

CP APMP

Application of Best Practices



150+ members worldwide  
27 NCA Members  
7 years experience

CPP APMP

Advocate of Best Practices

## Which Certification is Right for Me?

There are three levels of certification, each building upon the experience of the previous level: Foundation (CF APMP), Practitioner (CP APMP), and Professional (CPP APMP).

## Keeping Your Certification through CEUs.

Professional development doesn’t end with achievement of a new certification level. All APMP-certified professionals are expected to earn and track Continuing Education Units (CEU).



## APMP Certification

Every two years, those with Foundation Certification must earn 20 CEUs, and those with Practitioner and Professional Certification must earn 40 CEUs.

You can earn CEUs in several different ways:

- Participating in training
- Preparing materials, including articles, websites and blogs, conference presentations, and books on business development topics
- Attending events
- Volunteering
- Studying independently

Continuing Professional Development requirements are defined in [Managing Your Continuing Education Units \(CEUs\)](#).

### Tracking CEUs.

CEU tracking is on a two-year cycle from the date of your last/highest certification. You are responsible for tracking CEUs. Use the Professional Development section of your APMP profile to log CEUs. CEUs are periodically audited through the site.

Questions about Certification? Contact Maryann Lesnick at [membership@apmpnca.org](mailto:membership@apmpnca.org).



### MANAGING YOUR CONTINUING EDUCATION UNITS (CEUs)

Last updated May 2016



Maryann Lesnick, CPP APMP, PMP, CSM, is a Managing Director with Lohfeld Consulting Group ([mlesnick@lohfelddconsulting.com](mailto:mlesnick@lohfelddconsulting.com)). She provides training for the APMP Foundation Level Certification, and a Practitioner Level APMP certification mentor.

Lohfeld Consulting Group ([www.lohfelddconsulting.com](http://www.lohfelddconsulting.com)) is an Authorized Training Organization (ATO) for the APMP Certification program, offering Foundation Level training in both Webinar and Face-to-Face classroom formats.

## Proposal Tip...

Use SOW references in your headings to help reviewers map compliance.





# Your Team as Your Textbook: Knowledge Sharing on Proposal Teams

by Mary Claire Tracy, CF APMP

As proposal management professionals, we have ample opportunities for continuing education and professional development. We can attend conferences, online courses, workshops, seminars, and so on; the list is endless. Often, however, we don't recognize one of the most valuable learning resources we have—each other. Learning how to tap the knowledge and experience of our colleagues certainly helps us to broaden our viewpoints and learn new approaches, but it's also great for business! The more we vary our team members, the more we can learn from each other. A diverse team with a wide range of experience offers a valuable learning resource.

Often, we become so concerned with delivering a winning proposal that we can lose sight of the learning opportunities right in front of us. We can fall into “tried and true” practices, repeatedly seeking input from the same individuals with a specified range of backgrounds for proposal after proposal. For example, some organizations may exclusively seek writers with strong technical backgrounds for their teams. This may produce a proposal that answers RFP requirements with comprehensive and accurate technical content, but the team may struggle to develop the necessary message to distinguish the solution from that of other bidders. Imagine, however, that we bring in some writers with marketing backgrounds. These writers will



not be as well-versed on the technical aspects of the solution, but they can bring in extremely valuable insights to help hone the message to make the proposal stand out. In addition, by collaborating with each other, writers from both backgrounds actually expand their capabilities—the technical writers learn some new, marketing-based approaches, and the marketing writers gain some subject matter expertise.

This is just one example of how we can expand our knowledge by working with a diverse team. In addition to the usual mix of capture, business development, SME, and proposal management types, consider looking beyond established titles and bringing in people with differing areas of expertise:

- **Process Management**—these individuals can offer expertise in all manner of efficiencies to streamline operations and billing. These are

sometimes proposal managers or business development professionals, but this expertise can come from anywhere.

- **“Wonks”**—have their finger on the pulse of the current zeitgeist. They know what's trending, what gets the greatest consumer response, and how to capture audience imagination. These individuals may be marketing or social media experts, but they can come from a variety of fields.
- **Practical, or “On the Ground” Experts**—provide valuable practical information. While SMEs can provide detailed high-level knowledge regarding a particular project, system, or initiative, practical experts may have experience with the actual everyday operation, providing insight into user interfaces or customer experiences.

Often, we become so concerned with delivering a winning proposal that we can lose sight of the learning opportunities right in front of us.

- **Regulatory Experts**—individuals with compliance or regulatory backgrounds can help to ensure that the proposal addresses all RFP requirements because they are often trained to think like evaluators.
- **Formal Writing Experts**—have backgrounds primarily in English, rhetoric, and writing. They can help us to structure our arguments and evaluate our messages for cohesiveness and logic, make sure that our proposal has correct grammar and spelling, and facilitate adherence to style guidelines. Grammatical mistakes and inconsistencies can frustrate the reader, change meanings, and distract from our message.

Building a diverse team, however, requires effective planning and strategizing. First, we have to identify the desired skills or experience for our team members. We can employ best practices for this, such as holding regular meetings to determine which areas of expertise we need. We can also evaluate the performance and effectiveness of recent teams. Readers and other stakeholders can also provide valuable input. This should be an ongoing process as we improve our effectiveness and approach.

The next challenge is finding effective team members. Some desired skills may seem rather well-defined and part of standard job descriptions, but some may not. When recruiting, it proves useful to look beyond the resume and job description keywords. We may discover that the writer that we are interviewing is an avid wonk with an extensive knowledge of cultural trends. Likewise, we can work within our own organization to identify “hidden skills” for our colleagues...that proposal

manager may be a whiz at process management or have regulatory experience.

Although some organizations may have a large pool of talent from which to choose, others may not. Some proposal operations have a team of one. This is where we may have to reach outside the department to find experts in other areas of the company. Collaboration is key here, and it can really pay off. The proposal benefits from the expertise, and individuals from other areas have an opportunity to learn about the proposal process. This can promote a wider understanding among colleagues and a stronger commitment to the overall mission.

Collaborating with a diverse team can help us to increase our subject matter and procedural knowledge, of course. It can also help us to improve as professionals in more significant ways, however. Sharing ideas and entertaining new approaches helps to drive us out of our comfort zones; it helps us to become more flexible, responsive, and able to produce winning content.

Mary Claire Tracy, CF APMP, has worked as a Senior Manager, Proposals, at MAXIMUS since 2015. She brings more than 15 years of writing, editing, training, and regulatory compliance experience. She holds a BA and MA in English from the Catholic University of America.

### Note from the eZine Chair and Chief Editor, Candy Jenkins

We are very excited to present some fabulous articles in this month's issue about leadership and professional development. Don't forget to take advantage of the many benefits that the NCA Chapter has to offer along those lines, including the Mentor-Protégé Program, informational webinars, and various opportunities to work toward certification.

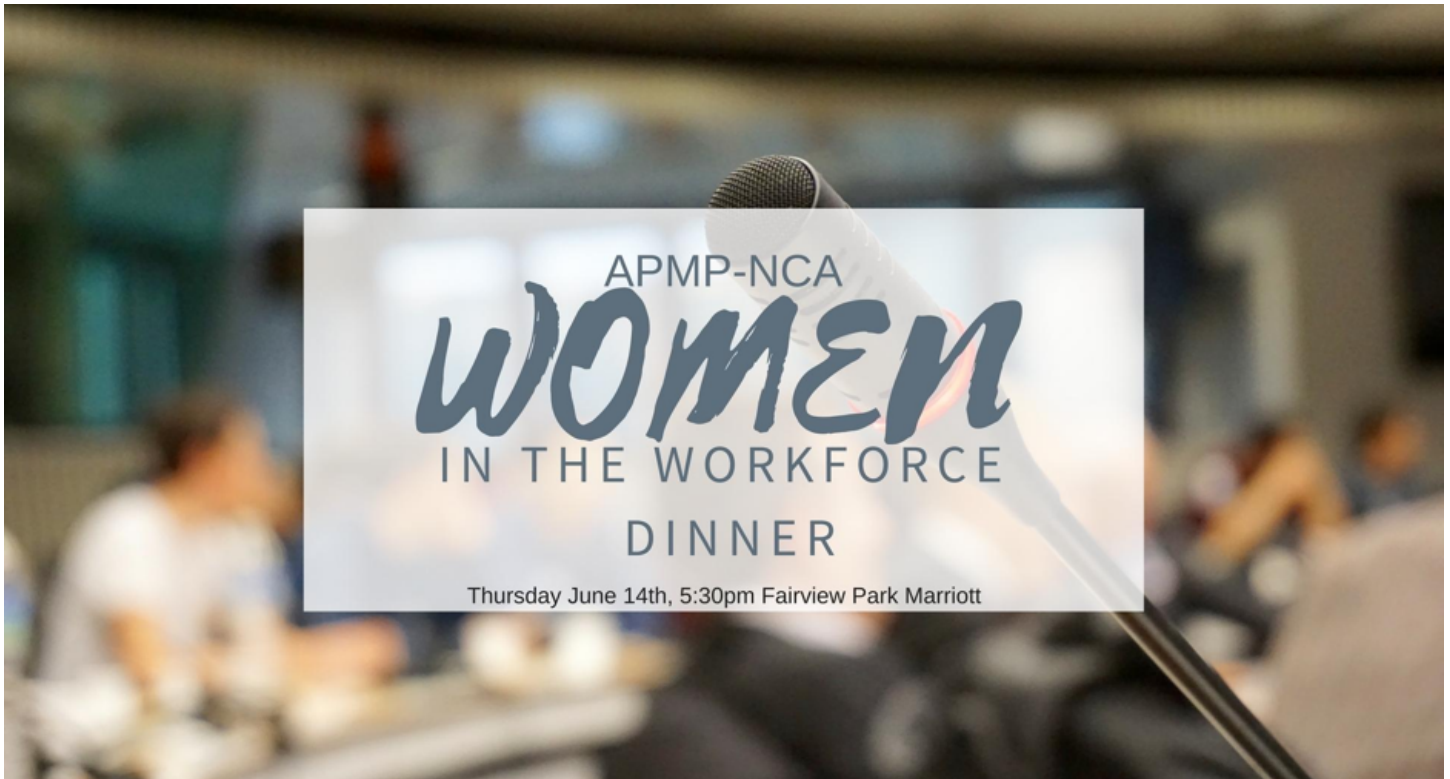
Another way that you can advance your career and your brand is to contribute to the eZine. Demonstrate that you are a thought leader in the proposal industry, and share your insights and expertise with more than 1,300 readers quarterly.

Please reach out to Candy today at [ezine@apmpnca.org](mailto:ezine@apmpnca.org) with your thoughts and ideas. We can't wait to hear from you!



# Don't Miss our Upcoming Events:

## June 14th APMP-NCA Women in the Industry Dinner



Please join us for an evening all about celebrating the working woman! APMP-NCA wants to acknowledge our women in the workplace and provide a glamorous evening of "Gold and Glitz". Come dressed for this theme, walk on the red carpet, and stop to pose for a photo in front of our step and repeat! Enjoy a delicious full dinner and host bar while you mingle with the vendors and listen to engaging presentations about "Value, Voice, and Victory" in the workplace! Grab your co-workers, your girlfriends, heck, bring your husbands, too, and join us at the Falls Church Marriott Fairview Park! This event is open for ALL to attend who wish to learn more about empowering women in the workplace and how we can learn and grow together!

**Keynote Presenter:** Tasseyy Russo

**Second Presenter:** Deb Hurley

**Closing Presenter:** Rebecca Link

**Vendors:**

- WorkAway Solutions LLC
- Willing Beauty by Viki Mutarelli
- Chloe + Isabel by Sabrina
- Isogenics by Andrea
- doTerra by Jennifer

[Tickets On](#)  
[Sale Now!](#)

## 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...

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

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

Please make check out to "APMP-NCA" and send to the following address:

APMP-NCA  
P.O. Box 711  
Arlington, VA 22116-0711

If paying by paypal, please contact Eric Schwarz at [Treasurer@apmpnca.org](mailto:Treasurer@apmpnca.org) to have a link set up.

APMP-NCA reserves the right to reject advertisements for non-proposal or non-business development-related products/services or for content it deems objectionable.



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# APMP-NCA 2018 Corporate Partners

## Diamond Partners

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