Going Green: Increasing Your Proposal Miles Per Gallon
The 12th Annual Southern Proposal Accents Conference

Jack Hales – Co-Chair, Florida Sunshine Chapter

More than 150 proposal professionals from across the country gathered at the Cobb Galleria Conference Centre in Atlanta on Friday, November 7th, 2008 for the 12th Annual Southern Proposal Accents Conference (SPAC). The theme of this year's conference was **"Going Green: Increasing your Proposal Miles Per Gallon"**. This year the conference became more regional in nature when the Georgia Chattahoochee and Carolina APMP Chapter hosts were joined by the new Florida Sunshine Chapter for the first time.

Congratulations to fourteen conference attendees who arrived early and took advantage of an APMP Foundation Level Accreditation Workshop the day before the Conference. They followed up workshop attendance with successful professional accreditation at the APMP Foundation Level.

A number of the many hardworking conference volunteers who were responsible for planning the conference and its flawless execution under the leadership of Conference Co-Chairs Karlotta Sanders, Keith Propst and David Sotolongo were on hand to greet attendees as they arrived and registered.

The quality of the presentations made were a tribute to SPAC's organizers and the talented presenters. Attendees faced difficult choices all day as simultaneous top-notch presentations competed for their attention in adjacent Ballrooms.

The conference got off to a very strong and **"Green"** start with presentations on "**Reducing Noxious Emissions, Getting Proposal Content Right"** by George McCulley and **Solutions for Seven Unsolvable Problems of Proposal Management** by Carl Dickson.

In **"Reducing Noxious Emissions, Getting Proposal Content Right"**, George warned of the danger of Buyer - Seller "Gaps", reminding his audience that today's clients are *Demanding* - wanting more, better and faster; *Sophisticated* – aware of products and costs; *Skeptical* – doubtful of sales people and tactics; *Conditional* – less loyal; *Judgmental* – of both sales people and solutions; *Open* – to both new vendors and internet-enabled localities; *Pressured* – to do more with less and have *More Choices* – via the Internet and virtual solutions. George says that to get our proposal content right, we need to "Get the **O-R-D-E-R**", his time-phased acronym for **O**pportunity, **R**esources, **D**ecision-making, **E**xact solution and **R**elationship. George cautioned that before we begin to develop a proposal, an Opportunity needs to be defined and scoped; making sure that it is real. We need to define both the internal and customer Resources required to work the opportunity as well as understanding the Decision making process and people. After we have formulated a solution based on O-R-D, our next step is to provide the customer with an Exact solution - a solution has no inherent value unless it solves a problem or meets a need. George summed up the process by reminding conference attendees that, "Like sales people, proposal professionals need to move from presenting features and benefits toward building customer relationships."

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Carl Dickson is a past President of the National Capital Area Chapter of the APMP and presented Solutions **for Seven Unsolvable Problems of Proposal Management.** Carl was joined in his presentation by his wife and business partner, Diane. They presented practical methods offering solutions to seven problems that come up over and over in proposal development. The problems presented and some suggested solutions were:

- The team is never prepared at RFP release/startup – Effective steps in answer to this problem include performing Readiness Reviews based on a formal list of questions and action items for each review. You must also use proportional Scheduling
- The team argues over proposal quality – You must define proposal quality by preparing a list of what it will take to win, plan your content to fulfill the list, validate whether you have achieved those things and bring your assignments, reviews and how you measure progress into alignment with your goals
- People don't follow the process – The process must be in writing and everyone must have a copy. It must be a tool used in every step, not merely a policy or reference document. It must be easier to use than to do without.
- Reviews aren't helpful – You have to list everything that needs to be validated and for each item on the list identify how it will be reviewed who will lead the effort, who will participate and when it will be performed. If you then review the plan before implementing it, reviews will become measurable, adaptable and accountable.
- There's always a train wreck at the end of the proposal – You have to change how you measure progress. It's not about control or deadline enforcement, crossing items or days off a list… It's about whether you achieved the things on your list of what it takes to win. You must make it harder for writers to be passive aggressive and run out the clock.
- Training is usually reserved only for "the chosen few" – The answers to this problem include lowering the cost, using distributed learning, minimizing the time commitment and bringing "training" closer to "doing"
- You can't convince people to bid less and win more – the secret to doing this is to ask whether they have completed a formal readiness review process and answered the questions that give an objective basis to determine whether you're ready to bid. Tell "them" you're ready to start tomorrow as soon as they answer those questions

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Graphics guru and author Mike Parkinson can always be counted on to make a dynamic presentation and "**Win or No Win? How to Make Winning Executive Summaries"** was no exception. Mike began by stating that the Executive Summary can be the most important aspect of your proposal if you effectively tie in your visuals with your words, evoke a strong emotional response and create a positive experience. However, he stressed the necessity that the proposal text and graphics must match.

As you would expect, Mike's presentation was extremely rich in graphics that emphasized the points he was making. A particularly entertaining portion of the presentation was a series of graphics that were classic examples of mismatching text and graphics. The presentation also featured an excellent introduction to color theory and the impact of color on mood.

Returning to Executive Summary specifics, Mike offered a list of steps to take to get your Executive Summary started. He told his audience that Executive Summaries should stand out, but not so much that you make your prospective customer think that you're presenting two different companies, teams or proposals. Mike suggested that you should "use the same template for executive summary graphics as your other graphics but visually kick them up a notch and informationally take them down a notch". Mike ended his presentation with emphasis on a variety of "Green" packaging options.

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The **World Class Proposal Writing Capabilities** presentation by Charlie Devine – Director of Research and Knowledge Management, BD-Institute highlighted outcomes from an industry-wide benchmark study of proposal writing best practices. The presentation provided a detailed discussion of the Study Background and Methodology, Study Demographics, Study Areas, Benchmark Study Results and How to Use the Results. The study was undertaken to:

- Validate the state-of-the-art in proposal writing
- Improve efficiency and effectiveness across all types of proposal writing
- Establish an end-state for world class proposal writing capability, and to
- Share results industry-wide

The presentation stated that what made the study special was that it was independent unbiased research by the Business Development Institute International, that it used the Capability Maturity Model for Business Development (BD-CMM) as the framework and that the methodology recognized that the success factors are closely linked to the study area. Study companies were selected based on benchmark criteria related to five areas and finally that there was proper consideration of prerequisites and the Business Development (BD) perspective of the organizations studied.

Study demographics revealed that 32 organizations in a variety of sectors heavily weighted toward Aerospace/Defense were screened and 23 studied. Companies studied employed from less that one hundred to over ten thousand. The areas examined in detail by the study were Proposal Development Steps, Use of Proposal Automation, Organization Constructs, Training and Other Factors that contribute to excellence

Study results were most interesting. While a total of 51 Best Practices across the five areas were identified, conference time constraints limited what could be presented to 10 highlights. The study was comprehensive examining 182 Best Practice Benchmarks across the five areas: Proposal Steps – 51, Proposal Automation – 35, Organizational Constructs – 24, Training – 22 and Other Factors – 50. Readers interested in more information on this presentation as well as the others highlighted here should refer to the end of this article for a link to presentation materials

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In his presentation **Making Time Your Best Friend, Not Your Worst Enemy,** John Lauderdale told conference participants that Proposal Management is a subset of Program/Project Management with processes, tools and principles of general application. He went on to say that Leadership is more important than Management and "Follow me" is more effective that "Do it this way". John provided specific principles, tools and processes that assist in managing time during proposal creation.

John highlighted that time pressure is universal in proposals and that time is money. Being late to intermediate deadlines is a precursor to being late for other deadlines, late deliveries or that last-minute panic that is too often a part of our business. He further maintained that the most important control mechanism is a comprehensive Proposal Development Schedule that should be found in the Proposal Plan, highlighting that both right-to-left and right-to-left scheduling are necessary in order to use time wisely.
Stressing the need for a comprehensive Proposal Plan, John then proposed a detailed allocation of activities for Pre-Solicitation, Solicitation + 5 days, Proposal Creation and Delivery and Post-Submission periods. He highlighted the need to begin with a Capture Plan as a tool to obtain permissions, buy-in and budget. John also crafted a strong case for use of the Executive Summary as a first step to ensure top-down proposal creation and executive involvement. Conference attendees were particularly enthusiastic about the specific Guideposts and Measures presented for each period.

The final tools presented for making time our best friend were absolute rules for a daily 7:30 AM "Stand-Up Proposal Team Meeting" and a 5:30 PM "Circle-the-Wagons Meeting". The Stand-Up meeting proposed consists of 1) a "Broadcast" or summary of what has happened since the last meeting that is of universal interest, 2) A review of the Action Item List, and 3) An "Around-the-Table" to ensure that everyone is on board. The purpose of the proposed "Circle the Wagons" meeting is Load Leveling. It is usually to be conducted with no published agenda or documentation and is probably the most important meeting for team building.

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What is the Cost of Going Green was presented by Michael Tresko. He has more than 20 years experience in Management and Business within the Defense, Aerospace, IT, Telecom and Services Industries and is currently a consultant with SM&A providing both Price to Win and Volume Leadership. He was a speaker at the 2008 APMP Conference in Rancho Mirage.

Michael's presentation was focused on the importance of having a Price-to-Win performed. Whether you are evaluating the impact of "Green Technology" or an IT outsourcing deal, in a competitive environment, performing a "Price to Win" (PTW) analysis for planning and strategizing is key to the price decision. Depending on the opportunity, different models can be used for determining price. This presentation also discussed a number of modeling techniques to address PTW. Of significant note was Michael's discussion of the value of information in the public domain and the methods of researching competitive assessment and landscape. Additionally, he discussed the importance of the client "globally warming" up to sharing their pricing data for the price to win.

The presentation also highlighted the Value of PTW in areas such as giving a target, allowing a quantitative evaluation technique to help management identify whether or not there is a play for them, helping to understand the competition, making the abstract quantifiable, giving the ability to set internal objectives and focusing energy toward winning, helping to drive the Bid or No Bid decision, protecting the company by protecting valuable business development or Bid and Proposal dollars to key win opportunities, helping to focus on win strategy and making the best proposal, i.e. Design to Cost vs. an overly exotic solution, and coupling PTW with other competitive information to help create the win and deal strategy.

Michael went on to describe the PTW process and what PTW can and cannot do. He stressed understanding of the target, competitive analysis, client insight and then presented three methods of performing PTW – a P and L based model, a Unit Cost model and a Price/Hour model with some associated techniques and their advantages. He ended his presentation with excellent discussions of sources of data for a PTW analysis and ethical issues/sources of data that should not be used.

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Conference Co-chair David Sotolongo capped the morning session's presentations with an entertaining and informative presentation of **8 Simple Rules for Dating My Proposal Manager**. David's presentation began with a humorous introduction detailing initial anguish over various views on the level of "political correctness" of the title of the presentation. He then went on to say that his underlying premise has three parts:

- Like parents, proposal managers want to put rules in place that provide a nurturing environment
- Rules that balance flexibility and enforcement create harmony, and
- Both parties must agree that the rules are good

David's "8 Simple Rules" for Proposal Managers are:

1. Act quickly with a go/no go bid decision
2. Establish a governing board for proposals
3. Touch every proposal in some way
4. Rank your proposals on a priority scale
5. Mandate kick-off and review meetings
6. Give review teams authority to "pull the plug"
7. Educate your company that the proposal manager owns the process, and
8. Deliver every proposal at least 24 hours early

The bottom line of the presentation was that these 8 Simple Rules can create balance in your professional lives… that staying late will be the exception rather than the rule giving you time for professional development (like the 2009 SPAC!). He also pointed out that you will notice that turnover in the proposal office will decrease and that you will decrease the number of cases in which a spouse changes the locks. He suggests that while it is OK to be great at your job, it is better to be better at everything else, suggesting that there are no real proposal heroes, but that that there are heroes to our families, friends and communities

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More Smiles per Proposal presented by APMP founding and charter member B. J. Lownie shows clearly reflects the fact that he is “Passionate about Proposals”. Those who have seen him make a presentation or attended one of his workshops know this to be a fact and those meeting him for the first time through this presentation learned why. With more than 25 years experience, BJ brings an incredible depth and breadth of experience within the proposal arena. He has worked on hundreds of proposals and had more than 3000 participants attend his workshops. To date, BJ's work on proposals has taken him to five continents.

This lively, interactive session introduced participants to ways in which they can determine an individual's suitability for a particular role and how best to motivate and develop that individual. BJ maintains that people who enjoy what they are doing and are well suited to their role perform at a higher level and make a more significant contribution to the team. They are more easily motivated, constantly seek to improve their skills, and are more positive. Working with them is easier, more work is accomplished, the results are better and it's more fun. When a person isn't happy in his or her role, it affects the entire team and company.

The session explored four key areas of proposal support (Business, Planning/Mgt, Content Development and Production) and the skill sets and behaviors of successful proposal people in those areas. It also examined how to determine which area an individual is most passionate, the particular traits that make a person successful in a given proposal role, how to uncover the information you really need to know about a person to make a good job match and how to motivate and develop a particular person based on his or her preferred style.

Successful people in the Business area of proposal support are passionate about pre-proposal planning, qualification and strategy development. They typically have a skill set that is sales oriented, persuasive, and oriented toward business & finance and are skilled facilitators. They demonstrate behaviors that are competitive, analytical, and visionary and are they are usually extroverted.

People that are successful at Planning/Management aspects are passionate about Plans, timelines, team building, monitoring and motivating. Their skill set can be expected to include leadership, project management skills and the ability to motivate and inspire. Their behaviors are usually those associated with team players, organized, detail oriented and they are typically extroverts.

Successful Content Development people that are successful are passionate about articulation, writing/editing and proofreading. Their skill set can be expected to match these areas closely and their behaviors are typically independent, organized and detail oriented. They may be introverted

Successful Production team members are usually passionate about such things as formatting, layout, graphics and attachments as well as printing and packaging. Their skill set includes skill with publishing applications like MSWord, Acrobat, etc., and an understanding of production requirements. They usually exhibit behaviors that are organized, structured, detail oriented and they may be introverted.

BJ pointed out that the best proposal teams and proposal people play to their strengths, do what they are suited for/enjoy/are passionate about, practice, hone, develop skills and knowledge, and delegate/outsource what they aren't suited for/don't do well/enjoy. He concluded his presentation by stressing three points:

- Successful proposal efforts require successful proposal teams
- Successful proposal teams require successful proposal people and a balance of skills and behaviors
- Successful proposal people require the right skills and knowledge, development, motivation, commitment and a passion for proposals.

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Knowing Your Destination Makes a Proposal Development Trip More Efficient; A Peek at the "Other Side" of the Procurement Table by Bill Andre presented a "behind the scenes" look at how a Request for Proposal is developed, issued and a procurement conducted. Bill has been an independent proposal consultant for more than 15 years with most of his work responding to government RFPs in the areas of engineering, environmental requirements and telecommunications. During his career as a proposal professional he has managed and supported winning proposals with a combined value in excess of $2.3 Billion, organized and refined proposal management and production processes, resulting in higher win rates and developed and presented training courses on such proposal-related topics as developing win strategies, determination of customer requirements, and the analysis of proposal-related "best practices."

While his presentation focused on experience on the customer side of government procurement, many of the lessons learned that he presented are directly applicable to any type of procurement.

Bill indicated that there are many pressures on the customer side that influence what is being written. Often, many of the participants are not too familiar with the procurement process and are assigned in addition to their regular job and be experiencing deadline constraints. He said that writing problems may result when writers are trying to hit a moving target as far as requirements and evaluation criteria go, pull information from an old RFP or to pull items from several sources resulting in elements that don't agree.

The remainder of this informative presentation provided an insight into the areas of technical review and evaluation, business review and evaluation, the negotiation and proposal revision process and contract award and the debrief processes. Based on his experience on a customer team, Bill cautioned that you should not make customers look for information, that the "hot buttons" that you are addressing should come directly from the evaluation and that you should **always** ask for a debrief – Win or Lose.

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Zero Emissions Proposals: Tips & Tricks for Successful Virtual Teams by Amy McGeady and Michelle Petty was a very timely presentation by two highly experienced proposal professionals who first worked together as part of a virtual proposal team. They effectively highlighted a number of the forces that making virtual proposal teams more common. They described the challenges and costs associated with bringing a proposal team together, pointing out that they have increased dramatically. Whether it's requiring frequent, extended travel; pulling operations staff from a client site; or decreased productivity resulting from travel time, co-locating the proposal team can have far reaching impacts on budget, performance, and morale.

The presentation identified a number of drivers responsible for the current trend to a proposal workplace in transition through greater use of virtual teams such as cost effectiveness, technological advancements, increased access to resources and increased productivity. However, the presenters cautioned that virtual teams are not without challenges such as the requirement for a high level of team and individual discipline, the difficulty measuring performance and the loss of the social aspect of the old “war room”.

Amy and Michelle offered practical tips for determining when to consider using virtual proposal teams and how to work effectively in a virtual environment. They discussed when to bring the team together (if at all), the effective use of collaborative document management tools, and the discipline of strong communication among dispersed team members. They presented a clear treatment of what is required to prepare for a virtual environment or how to get from here (co-located) to there (virtual) describing the necessary roles of a champion, a facilitator, the need to identify and engage “early adopters” as well as the requirement to modify processes and procedures. They ended their presentation with a thoughtful plan for a time-phased transition from a collocated to a virtual team.

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APMP Fellow, author and current Florida Sunshine Chapter Chair Chuck Keller presented **The RFP Green Thumb: Planting Seeds for an Abundant Harvest** recommending ways to prepare for, administer, analyze, and process RFPs. He described techniques for preparing and fertilizing your field before RFP release, and then planting and nurturing your proposal seeds after RFP release. Chuck has been in the proposal business for 25 years. He is an APMP Fellow and charter member and one of the founders of SPAC and the Georgia and Florida APMP Chapters.

Chuck presented the following 10 seeds to be planted and highlighted each with detailed explanations of the seed and practical advice on how to nurture them to increase the likelihood of an abundant harvest.

- Seed #1 – *Influence the RFP before and after release*
- Seed #2 – *Get an early proposal before RFP release*
- Seed #3 – *Prepare for and attend bid conferences and site visits*
- Seed #4 – *Carefully analyze the RFP, submit questions & comments as*
- Seed #5 – *Carefully analyze the RFP for customer*
- Seed #6 – *Use a coordinated system for RFP administration.*
- Seed #7 – *Follow RFP guidance to the letter for the proposal outline & content*
- Seed #8 – *Have a strategy for a RFP “Questions and Answers”*
- Seed #9 – *Use electronic RFPs to your advantage*
- Seed #10 – *Think before you ask for an extension*

Chuck’s experience based insight allowed him to provided his audience with detailed practical examples of techniques on how to nurture each type of seed.

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The Recycling Solution: The Lost Art of Feedback was an interactive and entertaining presentation by LaBrita Cash-Baskett that provided guidelines, principals and strategies for effective feedback based on her organizational communications expertise and experience training proposal managers to maximize potential and add value to organizations through effective communication and team member development. The presentation highlighted the fact that one of the most important tools for maintaining control and a high level of team performance is the proper use of feedback to enhance team effectiveness. This interactive and fun presentation provided guidelines, principals, and strategies for effective feedback.

The presentation highlighted the fact that feedback is a communication process that seeks to reduce organizational uncertainty. Feedback allows you to compare actual performance with standards of performance and should provide constructive information to help the recipient become aware of the effectiveness of their actions in order to maintain or enhance their present level of effectiveness, confirm their view of self, reveal aspects of self, reveal consequences of behavior and help keep in touch with what is going on in the environment

The presentation highlighted that feedback can be either Supportive or Corrective. Supportive feedback will acknowledge actions, acknowledge results, and discuss reinforcement; explain effects of accomplishments, and state your appreciation, help receivers take responsibility, use the opportunity to discuss related issues, and maximize an atmosphere of trust, and **Say Thank You!!** Corrective feedback will immediately describe actions in behavioral terms, ask what happened, result in acceptance of responsibility & learning, and develop a plan to deal with the issues.

The presentation concluded with a number of great tips for attendees to take away:

- Feedback should be given at an appropriate time and place
- Focus feedback on the person’s behavior, not their personality
- Be descriptive, not judgmental
- Focus feedback on a specific situation rather than abstract behavior
- Focus feedback on the “here and now” not the “there and then”
- Share your perceptions and feelings, not advice
- Not force feedback on other people
- Not give people more feedback than they can handle at the time
- Focus feedback on the actions the person can change