

Stepping Up Your Proposal Expertise

APMP® California Chapter 2013 Training Day

Disney's Grand Californian Hotel® & Spa

October 25, 2013

APMP® California Chapter's annual Training Day brought together over 50 capture and proposal professionals from Southern and Northern California; from as far away as Virginia, Arizona and Florida; and from a wide variety of industries, including aerospace & defense, higher education, health care, information technology, insurance, engineering, independent businesses, and consulting. As in the last few years, a great number of hands went up when asked, "How many of you are first-time attendees at our Training Day event?" APMP® Executive Director, **Rick Harris**, attended the event and provided an enthusiastic welcome and message of support. The chapter, and each of the speakers and their companies, provided a great number of quality giveaway and raffle items, including tote bags; notepads with the chapter logo and web link printed on them; quality pens from consulting companies; graphics, capture & proposal books; a memory stick with easily editable graphics; a Wordman® application add-on file; and an American Express cash gift card, to name a few.

Keynote speaker **Mike Parkinson**, CPP APMP Fellow and co-owner of the 24 Hour Company, provided a very thought-inducing talk entitled, *From the Outside In (Listen, Learn, Share, Succeed)*. Mike invited attendees to look at key life experiences, both negative and positive, to evaluate root causes for success and failure. He suggested that much of our success can be tied to effective interactions with family, friends and colleagues. By looking at the details of our interaction with people, as well as our behavioral characteristics, body language, and human responses, Mike suggested that attendees could benefit from analysis and the incorporation of positive people skills into our role as proposal leaders and professionals. Given the very interactive nature of Mike's presentation, slides are not posted for this session.

Speaker **Gerald Gutierrez**, Vice President of Proposal Leadership at SM&A, provided a very interesting talk, entitled, *Leading vs. Managing a Proposal: How to Get the Best Performance from Your Proposal Team*. Knowing that proposals can often be adversarial and stressful, he stated that you need the best performance from your proposal team to win a procurement. Knowing how to motivate the proposal team, keep them engaged, and keep them from burning out or blowing up are critical to delivering the best possible proposal. Gerald provided excellent insight into the differences between providing leadership on a proposal versus simply managing a proposal. Gerald cited many of John C. Maxwell's 'The 21 Irrefutable Laws of Leadership' and discussed how they relate to a proposal environment.

Ed Alexander, CPP APMP Fellow and Vice President of Training at Shipley Associates, presented, *Decision Gates and Reviews: Understanding the Key Milestones*. Ed helped attendees to understand the importance of key milestones in the capture and proposal development process – milestones that cannot be overlooked. This included how each milestone fits within the process, who should be involved, and the most important inputs and outputs of each milestone

decision or review. Ed entertained the crowd by playing a lengthy recording of a fictitious kickoff meeting teleconference. The mistakes we heard had everyone laughing, however, we all could identify with the issues, having experienced most of them at some point in our proposal careers. Ed addressed ways to modify the process of implementing decision gates and reviews, based upon the complexity and strategic value of the opportunity. Each participant received a CD of the *Decision Gates and Reviews* section of the *Shipley Capture Guide* and samples of tools and templates to help with key decision gates and color team reviews.

After enjoying a typical first-class Disney lunch under a canopy of beautiful trees in the court yard (and the monorail rolling above our heads), **Mike Parkinson** energized our post-lunch session with his trademark high energy game, followed by his presentation, *Make Marketing Matter: BD Marketing Secrets Revealed*. Mike stated that effective marketing influences RFP content and impacts win rates. Sadly, most organizations waste time and money with little to show for their marketing efforts. Mike shared best practices that successful companies use to grow their brand and bottom line, including using innovative neuro-marketing techniques to step up proposal quality and win results. He challenged attendees to employ described methods, in small and large companies, to get measurable results.

We were all fortunate to experience a brand new session style at Training Day, with **BJ Lownie**, CPP APMP Fellow, Managing Director and Principal Consultant of Strategic Proposals, moderating a panel of consultants, asking thought-provoking questions and engaging them in ensuing discussion. The session, titled, *Consultant Panel: The Client-Consultant Relationship*, drew upon the experience and knowledge of **Mike Parkinson**, **Gerald Gutierrez**, **Mike Parkinson**, and of course, BJ himself adding his comments into the mix. The panel revealed experiences (good and bad) with prior clients, what consultants expect from their clients, characteristics of a good consultant, and what clients expect from a consultant. The audience shared past experiences using consultants and many audience questions were answered. The entire session was recorded and a copy of the transcript has been posted.

Our final presentation of the day saw **BJ Lownie** presenting, *Proposals as a Profession (a Proposal Professional's Perspective)*. BJ has over 30 years of experience in proposals and has great insight into the personal and professional characteristics that lead to success in our profession. Given that major educational institutions do not offer degrees in proposals, BJ stated that proposal development is a chosen profession, and to the professional, is not just a job. Like any profession, there are requirements for those performing the work, standards which should be adhered to, and best practices that need to be followed. BJ offered his perspective on numerous tips for making our work life more enjoyable and rewarding.

Attendees were challenged to take away a few new tips, techniques or best practices to apply directly in their daily proposal operations. The excitement of the day was capped off by a large number of the speakers and attendees socializing and networking at the Tangerine Grill & Patio at the Anabella Hotel...just one block away. We all enjoyed good food, friendship and shared our thoughts on the day's activities, which drifted into early plans for 2014 chapter events.

We thank the presenters for sharing their expertise and insights with our group. Copies of the released presentations are available on our **Library** page.