

Something for everyone at APMP California Chapter's 2014 Training Day

APMP California Chapter's 2014 Training Day offered perspectives on how we do our jobs and specific tips and techniques to help proposal and capture professionals be more successful.

More than 50 professionals, ranging from veterans to those just starting out in capture and proposals, attended the event at the Disneyland Hotel in Anaheim. The event drew approximately 16 first-time participants and attracted people from a wide range of industries, including healthcare, insurance, engineering, pharmaceuticals, solar power, academia, and aerospace. Here is a summary of what they heard:

Ajay Patel, President & CEO of SM&A (the event's main sponsor), gave a perspective on whether our profession lives too much in the past. He pointed out that some key research on communication dates to the 1950s and 1960s, but the information revolution of the 1990s made profound changes in how information is shared and understood. "This is how we've done it for 20 years. I'm just asking, is it still the right way?"

In particular, he said that we should think more carefully about how we use graphics to communicate. They should contribute to the proposal's narrative, be easy to understand, and be impossible to misunderstand.

Even with good graphics, Ajay emphasized that a clear text message is necessary for a proposal to be successful. "Why is great literature great literature?" he asked. "It's because of the narrative."



Ajay Patel, President & CEO of SM&A, challenged the group to think differently about how we approach our work.

Randy Richter, right, speaking with Tom Webb after his presentation, laid out five forces that can drive bid strategy.

Randy Richter, President of Richter & Co. in Frederick, MD, followed with a description of how Porter's 5 Forces should guide bid decisions and proposal approaches. The five forces are:

1. Threat of new entrants to the market.
2. Bargaining power of suppliers.
3. Bargaining power of the buyer.
4. The threat of substitution, i.e., a different product from a different market.
5. Rivalry among existing competitors.

These factors drive market and pricing decisions. Our challenge is not necessarily to come in with the lowest price, but to justify the value of the price we do propose, he said. Best practices for using these forces to figure out proposal strategy include:

1. Performing an analysis, independent of the sales/marketing decision.
2. Clearly defining the context – the market or the specific bid opportunity?
3. Identifying your point of view. An incumbent will view the market or opportunity differently than a new entrant will.



Beverley Sinclair, left, and Nancy Webb took the audience through an approach for figuring out what our message is and what the most accessible way of presenting it to the audience should be.

Beverley Sinclair, CF APMP, Principal, Sinclair & Associates, and **Nancy Webb**, Owner of Nancy Webb Graphic Design, discussed the confluence of content and presentation. Beverley, a former college professor, is interested in communication theory. She pointed out that communication only works in the space where the sender and receiver share a common field of experience. For proposals, that means that the sales message will be effective only if we

understand what the buyer's needs, wants, issues, and concerns are, and then only if we can make it clear how the proposed solution solves them.

A key question, Beverley said, is who is the client? There is the issuer of the RFP, the reviewer, and then all of the stakeholders in the decision – maybe even including elected officials and the public. A good proposal will take all of this into consideration. She recommends making a grid showing all of the decision points and all of the stakeholders, and then indicating which stakeholders consider which issues important. The more check-boxes on an issue, the more attention that subject should get in the proposal.

That proposal must be readable and accessible, Nancy pointed out. She said we should treat Page Architecture (a trademark of her firm) in the same way we treat the layout of furniture in a room. There needs to be space to move around, and things should be organized logically. Bad layout is akin to putting obstacles in the room, causing the readers to do the equivalent of bumping their shins on the furniture. Good page architecture uses white space effectively, provides a natural point of entry for the eye, provides resting points, and has a logical flow. The job, she said, is to keep the reader on the page and not to let him or her get distracted. If your proposal is the first one that the reviewers pick up, it sets the bar that the others have to beat.

To get your subject matter experts to conform to page architecture, you should provide writing templates for them to use. This will encourage the use of heading and subheading schemas that contribute to scannability and greater readability, Nancy said.



All of our jobs would be in jeopardy if they depended on having as solid a command of Microsoft Word as Dick Eassom does.

After **Dick Eassom**, CF APMP, Fellow (former APMP CEO), Director of SM&A, presented a rousing session of Wordparty, which left most of the participants feeling a little bit sheepish about their command of Microsoft Word and APMP history, **Robin Davis**, CF APMP, Fellow, CEO of Metre, discussed ways for proposal people to command greater respect and influence within

their organizations. Robin advised that we must build trust, build partnerships, and think and act strategically to communicate our value.

We should approach our role in the proposal process as a “thought partner,” whose mission is to accomplish the organization’s goals. This is far more constructive than entering into an adversarial relationship, she said. We need to make our subject matter experts and management to understand and appreciate the contributions we will make to the proposal process, and we need to follow through on the promises we make, or, as Robin put it, “prepare, promise, and prove it.”



Robin Davis of Metre gave us suggestions for “managing up” and demonstrating our value to our organizations.



Tom Sant, of Hyde Park Partners, laid out the principles for turning marketing goop into proposal gold.

Finally, **Tom Sant**, Fellow, Co-Founder of Hyde Park Partners, discussed the process of turning standard marketing material, and well-intentioned content from subject matter experts, into language that actually communicates effectively.

Subject matter experts tend to write in a language that they are familiar and comfortable with, which can leave proposal reviewers lost. We need to steer SMEs in the right direction and rewrite their content when they can’t get out of the “fallacy of the familiar,” Tom said.

It is especially important for a proposal to make a good first impression because of the primacy principle, he said. That is, first impressions matter more than they perhaps should. If the reviewers don’t quickly feel confident that they will get what they need from us, they will not buy from us. Tom presented research that showed that a written document has about seven minutes to make a good first impression; a face-to-face presentation about four minutes; and a telephone conversation or webinar about one minute. We need to understand what the customer wants and very clearly demonstrate that we can deliver on it.

What else did we do? We had raffles. We ate lunch. We talked. We shared. We learned. And, for the most part, we spent a day out of the office without the world coming to an end!

