

The Association for Proposal Management Professionals - Houston



Final Draft

Dec. 5 Meeting to Focus on 'Qualifying or Quantifying Your Bid/No-Bid Decision'

Save the Dates and Follow the Links ...

- [Deadline to Vote for International APMP Board Members](#), Fri., Nov. 30
- [APMP Houston Chapter Meeting](#), Wed., Dec. 5, 3010 Briarpark Dr.
- APMP Houston Board of Directors Meeting, Wed., Jan. 9, 3010 Briarpark Dr.
- APMP Houston Chapter Meeting, Wed., Feb. 6, 3010 Briarpark Dr.
- [19th Annual APMP International Conference and Exhibits](#), Tue.-Fri., May 27-30, 2008, Rancho Mirage, Calif.

Tim Budzik, a senior capture manager at Houston-based [United Space Alliance](#), will deliver a presentation on "Quantifying or Qualifying Your Bid/No-Bid Decision" at the next meeting of the Greater Houston Chapter of the Association for Proposal Management Professionals (APMP) on Wednesday, Dec. 5.

The meeting begins at 11 a.m. at ABB, 3010 Briarpark Drive, in the Bryan/College Station Conference Room. Admission to the APMP chapter meeting is \$20 for members, \$25 for nonmembers, and \$15 for students (student ID required), and includes lunch. Seating is limited.

Mr. Budzik's presentation will discuss the use of a blended approach of quantifying and qualifying bid/no-bid decisions. This



Tim Budzik will speak at the Dec. 5 chapter meeting.

approach provides an alternative to reliance on software tools and techniques to develop win probability (Pwin) numbers to support bid/no-bid and teaming decisions.

According to Mr. Budzik, these tools and techniques tend use statistics based on probability theory

that link dependencies between variables.

"These methods require a defined set of questions where the answers are converted to numbers," Mr. Budzik said. "Although this approach does make decision making easier by quantifying a combination of options, it tends to miss important qualitative decision-making criteria."

Mr. Budzik has more than 20 years of experience in capturing and managing large programs for industry and government ranging from multimillion-dollar programs to \$9 billion acquisitions. In his current role at United Space Alliance (USA), Mr. Budzik is responsible for developing new business markets.

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Our Newsletter Has a New Name ... Final Draft

The votes are in. The Greater Houston Chapter of APMP now has a new name for its semi-monthly publication.

Final Draft was formally adopted as the permanent chapter newsletter name, replacing the interim

"News and Views" that had been used for the first three editions.

Houston APMP members attending the October chapter meeting selected *Final Draft* from a list of nominated names previously submitted.

Additionally, the APMP Houston Board of Directors awarded David Arnold a \$25 American Express gift certificate for participating in the lead-up contest that solicited potential newsletter names from chapter members.

From the Prez: *A Busy Year Worldwide ... and Locally*

This has been a busy year for both the Greater Houston Chapter of APMP as well as the organization worldwide.

The APMP, as a whole, now has more than 2,500 members worldwide. New chapters have formed in New York, Florida, Canada, and Germany.

Here in Houston in 2007, our chapter achieved the following:

- Celebrated the 10th anniversary of its charter
- Started publishing this chapter newsletter
- Continued to offer informative sessions that help our members and guests improve as proposal professionals

For 2008, we are going to continue offering interesting speakers and topics, as well as con-

tinuing issues of the *Final Draft*. If you have a suggestion for a speaker or would like to write an article for this newsletter, let us know.

On behalf of the Board of Directors of the Greater Houston Chapter, I wish you a joyous holiday season and best of luck for the New Year.

See you soon!

Regards,



Jeannette Waldie, AM.APMP
President,
Greater Houston APMP Chapter
and Central U.S. Regional
APMP Representative

Battling the Battle of the Bulk? Learn How to Use Graphics, Photos in Microsoft Office Without Having a Huge File

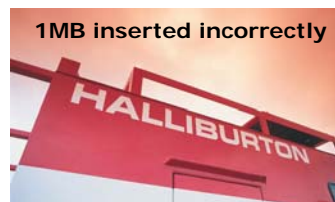
By David Wallis

Photographs and other graphics help create interest and improve the readability of proposals. (Remember the basic design rule of one-third text, one-third graphics, and one-third white space.) Below are a few tips for efficiently incorporating graphics.

Graphics don't have to mean overwhelming your computer.

Excessively large Word or PowerPoint files (more than 10 megabytes) put a strain on your computer and make it harder to e-mail files. Since graphics are usually the reason for large file sizes, we may hesitate to incorporate them.

Fortunately, Microsoft Office provides several options for reducing the size of photos and graphics. The key is to understand how image compression works and how graphics are imported into your document.



The difference between compressed (left) and uncompressed images goes much deeper than what the eye sees.

In an uncompressed image file, such as a BMP file, the computer stores a value for each and every pixel in the image. This can result in a single photograph being several megabytes.

When an image is compressed, such as with JPG, the computer uses a form of shorthand to store the values of similar pixels as one item. For example, if there is an area of similar color in the photo, the file simply records it as "use the same color for this entire area" rather than recording each pixel.

This compression can dramatically reduce the file size without

necessarily losing any quality. Compression schemes typically allow you to decrease the quality to make the file even smaller if you so desire.

So, to ensure that Microsoft Office files are not unnecessarily large, you want to make sure that your images are using this compression.

If you go to Insert, Picture, From File and point Microsoft Office to a graphic file, it will read the extension (JPG, for example) and automatically apply the appropriate filter to ensure compression and, therefore, a small file size.

However, if you copy a graphic to the Windows Clipboard and then simply paste it into Office, the application has no way of knowing what type of graphic it is so it pastes it as a bitmap. Office cannot compress bitmaps, so this results in an excessively large file.

Here's an example. Let's say you have a 200 kb JPG file and a blank Word document. If you use the "Insert" method from the toolbar and then save it, your Word document should be only slightly larger than 200 kb. However, if you paste the same image from the clipboard and then save the Word file, the result could be several megabytes.

Multiply this by the number of graphics in a long document, and it's easy to see how you can end up with a 20 MB file that could have been 2 MB!

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Project Interview Coaching Can Lead to Wins

By Sandra Zimmer

[The Self-Expression Center](#)

Project team leaders are often brilliant at their technical expertise but may lack the presentation and persuasion skills to win a project. If they are stiff and boring at the project interview, they may lose a project for which they are the best choice.

The success of your company depends on developing new business and the ability of your team leaders to present persuasively in project interviews. To win new projects, team leaders must not only be able to present their technical expertise, ideas, and processes in a credible manner, they must also be emotionally engaging and compelling so that the client selection panel feels your project team is the clear winner.

The Real Purpose of Project Interviews

When you are short-listed, the client already deems your firm capable and competent. Your job in the project interview is not to tell them you can do the project; rather, it is to connect with the clients. The client selection panel is looking for the team to trust. So, your experts must show the clients that they can trust your team to guide them safely through the project.

Setting up a Preparation and Practice Process

It often falls to the proposal manager or marketing director to help technical experts and team leaders plan and prepare for the interview presentation. It takes time to prepare a winning presentation, often more time than presenters want to spend. I will most often schedule two-and-a-half days, with time in between those days for presenters to write their talks.

The following schedule of steps can be helpful in guiding presenters through the process of planning and preparing to present. Time periods for each step will adjust according to the amount of time available.



Sandra Zimmer, founder of [The Self-Expression Center](#), makes a key point during a presentation he delivered to the Greater Houston Chapter of APMP on Oct. 3.

Day 1 – A Full Day of Collecting Ideas

Welcome and Overview – About One Hour

- Define the intent of the interview
 - What is our intention?
 - What do we want to happen?
- Set the tone of the interview
 - How do we want this interview to feel to us and the clients?
 - What do we want it to look like?
 - Qualities we want to come through?
 - How do we get the clients engaged?
 - What do the clients need from us?

Collect Key Issues and Messages – About Two Hours

- Identify key issues to present

- The main theme? What is the golden strand that weaves throughout? The ONE key point that makes the difference?
- What are the persuasive stories to tell?
- How can we give them a SURPRISE about what we can do for them?
- What is each person's intention?

Preparing for Q&A During Lunch (Someone Needs to Scribe) – One Hour

- What are the competitors going to do?
- What are the hard questions to answer?
- How do we answer the hard questions?

Clarify Structure of the Interview Presentation – About One Hour

- What will be the order?

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Project Interview Coaching Can Lead to Wins

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- Who will speak?
- How much time will each person have?
- How will they interact with each other?
- How will they interact with the clients?
- What will the room layout be?
- How will we set the stage?

“Alone Time” – About One Hour

- Each presenter thinks through and writes out his or her thoughts

Verbalizing the Individual Messages – About Two Hours

- Identify visual aids, slides, boards, etc.
- Warm-up exercises
- Grounding meditation
- Talk through their parts (say it as if you were really saying it to the clients)
- Listen to the others for ideas and concepts with which to connect

Day 2 (One Week Later) – A Full Day of Rehearsal

- Begin the walkthrough: Make it physical
 - Define the space and set-up
 - Start to “physicalize” the presentation (who will be where and how will you move?)
 - What will your physical presentation be like? Sitting? Standing? Moving? Interacting?
 - Look for ways of delivering that allow each presenter to be comfortable and natural
- Continue the walkthrough: Stand up and deliver
 - Put the presentation on its feet
 - Break it into segments for rehearsal
 - Put it all together
 - Practice several times

- Discuss problems and issues

Day 3 – Dress Rehearsal – About Four to Six Hours

- Discuss problems and concerns
- Final preparations
- Physical warm-up and grounding relaxation exercise
- Run dress rehearsal in front of live audience mock client panel
 - Feedback and suggestions from the mock panel
 - Any cleanup based on feedback

Coaching Skills

Coaching is not criticism. It is facilitating the process to make it easy for the team to prepare and practice. The following coaching skills will help you help them shine.

- *Help them relax and develop presence.* Bring in some out-of-the-box exercises to get them relaxed in their bodies. Stretching, muscle-shaking and visualization exercises will help them release the tension of presenting. I use a grounding exercise that develops presence and gets people comfortable in their skins. While it is too long to explain here, you can get a copy of it from [my Web site](#).
- *Help them find stories that make the presentation compelling and persuasive.* Ask them to make a list of roles that they have played in their professional lives like project manager, construction manager, principal in charge. Have them ask this question for each role, “Can I recall a time when I was in this role and I experienced a conflict, a decision, a discovery or a success?” That question will cause stories to pop up to memory. Then direct them to evaluate the lesson learned from that story. Use stories and lessons learned to introduce the important points in their talk. Stories can be from projects in the past that are relevant to this project, but

they can also be personal stories that have a universal message that applies to this situation.

- *Help them connect.* Coach your experts to talk one to one while they are presenting. Encourage them to have a one-to-one conversation with different people in the client selection panel. This makes them feel safer and creates a conversational tone.
- *Give feedback that supports their confidence rather than tearing it down.* Presenters are nervous, anxious, and vulnerable even if they don’t show it. Don’t focus on what they are doing wrong. Instead, use a “yes, and” approach to feedback. For instance, don’t say, “You are not connecting.” Instead say, “Wow, the way you expressed that was excellent. Now when you do it again, I want you to talk one to one with individuals in the audience, so that you make more connection while sharing that point.”

Achieving Good Chemistry, Unified Teams

Skillfully guiding your teams through a complete presentation preparation process helps each person connect to his or her natural abilities to speak comfortably, passionately, and persuasively. Because the whole team is co-creating the presentation, they establish chemistry and appear as a unified team before the client selection panel. The chemistry established among team members carries over to group communication when your team begins the project.

Sandra Zimmer is president of Sandra Zimmer & Associates, Inc., and founder of [The Self-Expression Center](#). Her programs help transform the way professionals express who they are so they feel confident to share their ideas and expertise when they speak, sell, or persuade. Ms. Zimmer holds a master’s degree in theater from The University of Houston, teaching certification in voice and speech from renowned voice trainer [Arthur Lessac](#), and a bachelor’s degree in psychology from the University of Texas.

Accreditation Summit Is APMP-Professional

PPIP, Assessor Panel Interview Required to Earn Highest Level

By Holly Andrews, PPF.APMP
APMP Fellow

As with any profession that evolves, people develop and refine ways to work smarter and more efficiently. They exchange war stories, train others, develop processes and then find ways to improve those processes. From these efforts, best practices are born, and in our profession, those who earn the [APMP-Professional™](#) level of accreditation are regarded as leaders in best practices.

The APMP, through years of reviewing, testing, and refining, has come to endorse a number of best practices that cover a broad spectrum of proposal management efforts. As the premier association dedicated to all aspects of business acquisition, the APMP is the de facto source of knowledge for our profession. However, endorsing and espousing best practices isn't the last step. Rather, the APMP felt it was time to develop a professional accreditation program that would certify proposal professionals based on their understanding, use and advocacy of best practices. Achieving any level of certification has meaning because simply understanding what constitutes best practice is a major step.

However, attaining the APMP-Professional level of certification requires that individuals show not only that they use best practices in their job and help others do the same, it shows those individuals are strong advocates of best practices and are committed to furthering the development and professionalism of our chosen career. By working hard to continually improve how we do this work and share best practices with others so that they can succeed, APMP-Professionals prove the value of this profession. That is why the APMP elevates it

Proposal Professional Impact Paper

Submitted and Presented by:



The required Proposal Profession Impact Paper (PPIP) cannot reflect your day-to-day work. Rather, it must show how the candidate for APMP-Professional accreditation has gone "above and beyond" to make a difference in this profession, according to Holly Andrews, an APMP Fellow who serves as the U.S. liaison for APMP's professional accreditation program.

to the level of recognition and respect that it deserves.

QUESTION: *Why should proposal professionals strive to achieve this level of accreditation?*

The APMP-Professional level is a recognized validation of your knowledge, achievements, and commitment to this profession. As with many professions, there is meaning to professional certification. For project managers, it's becoming a [Project Management Professional](#) by the Project Management Institute; for accountants, it's becoming a [Certified Public Accountant](#), in human resources, multiple certification levels are offered by the [Human Resource Certification Institute](#); and for engineers, it's the designation of [Professional Engineer](#). Individuals who seek professional certification want that validation of their education, experience, and hard work.

And when I talk about this certification recognizing an individual's commitment to their profession, I don't mean to imply that if you don't seek certification, you aren't committed to your job. What I am saying is that to achieve the APMP-Professional level of certification, you must provide evidence of what you have done or are doing that positively impacts our profession. It requires more than doing your job well. It requires that extra effort to contribute to the development of our profession.

QUESTION: *Briefly, what are the requirements for achieving this designation?*

First, you must have passed both the [APMP-Foundation™](#) and [APMP-Practitioner™](#) levels of the [APMP Accreditation Program](#).

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The mission of the Association for Proposal Management Professionals (APMP) is to advance the arts, sciences and technology of new business acquisition and to promote the professionalism of those engaged in those pursuits.

We are extremely proud that we have grown into an internationally recognized association with membership and corporate sponsors from a diverse range of disciplines and industries who are committed to the pursuit of proposal excellence. Our journey has been one of promoting the professionalism of our members and shaping the future of the proposal profession throughout the world.

*APMP is a learning environment for both novice and seasoned proposal professionals. We offer professional symposia, conferences, and publications - the **Perspective and the Journal of the Association of Proposal Management Professionals.***

Join our organization online at https://www.apmp.org/siteSpecific/customer/register_accountData.aspx. You can pay with a credit card or check (follow the online instructions). For a chapter affiliation, simply select the Greater Houston Chapter from the corresponding drop-down list.

Join us and discover how we can help you pursue new horizons in proposal excellence.

Next Meeting to Focus on Bid/No Bid Decisions

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USA is one of the world's leading space operations companies. Established in 1996, USA is equally owned by aerospace industry giants [Boeing](#) and [Lockheed Martin](#), and employs more than 10,500 people in Texas, Florida, Alabama, California, Washington, D.C., and Russia.

Before joining USA, Mr. Budzik was director of capture and proposal consulting for [Shiple Associates](#), where he was responsible for the client delivery, process delivery and new consultant training. Additionally, Mr. Budzik has earned the [APMP-Foundation™](#) level accreditation.

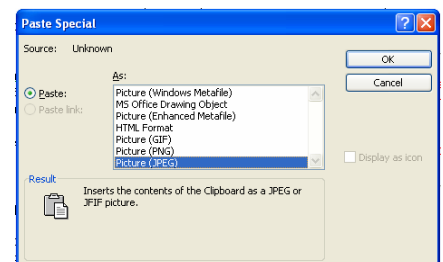
Manage the Size of Your Microsoft Office Documents by Using These Helpful Tips

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TIP: Always add graphics using "Insert, Picture, From File" and NOT by pasting from the clipboard.

Many times you have a document which already has the graphics inserted. If you want to reduce the size without having to save and reinsert each graphic, one trick is to "Cut" a graphic and then immediately reinsert it using "Edit, Paste Special." The Paste Special command will then allow you to tell Office what kind of graphic it is, which can enable compression. There are no exact rules for choosing which option under Paste Special will work best, so you may have to experiment.

Note: PNG often works well for photographs.



TIP: If graphics are already inserted, try cutting them, then reinserting using "Edit, Paste Special" to convert them to a compressible format.

David Wallis is a senior proposal manager for [Halliburton's](#) global strategic project group. He created and regularly delivers proposal training throughout Halliburton. He has more than 10 years of experience with large oilfield services tenders and is a member of APMP's Houston Chapter.