

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.

Continued on Page 8

In This Issue ...

From the Prez	2
Managing File Sizes for Graphics	2
Project Interview Coaching	3
APMP-Professional Level	4

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!

Continued on Page 8

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 she 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?

Continued on Page 4

Project Interview Coaching Can Lead to Wins

Continued from Page 3

- 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](#).

Continued on Page 6

Accreditation Summit Is APMP-Professional

Continued from Page 7

Next, you must have at least seven years of experience in the proposal profession. Third, you must have a referee who can attest to your years of experience and complete an assessment of your behavior and attitude with respect to your job. Fourth, you must complete a Proposal Profession Impact Paper™ (PPIP™) where you provide evidence of what you do to continue your professional development and describe what you have done to contribute to the development of our profession (see related question below). Finally, you will be interviewed by an Assessor Panel that will ask that you formally present your PPIP and answer a number of questions about your efforts.

QUESTION: *What is the role of the reference person and the referee as noted in the first of the three parts of this accreditation level? Are they the same person? Can/should they be the same person?*

You can use the same or different people as your referees (reference) throughout your accreditation pursuit. Your referee for the APMP-Foundation level need only confirm that you've been in the proposal profession for one year. That person can be anyone who knows you and what you've done.

Your referee for the APMP-Practitioner level must be able to confirm you have three years of experience and be interviewed by an Assessor who will ask them to confirm some of the information you provided in your self-assessment. That interview typically lasts 10-15 minutes. So that person must necessarily have more knowledge of your work than your APMP-Foundation level referee.

Finally, your referee for the APMP-Professional level must be able to confirm your seven years of experience and be familiar enough with you and your work habits to complete a 30 minute online assessment of the

behaviors and attitudes you exhibit in your proposal management role. So you can see that as you seek higher levels of certification, your referee must have more detailed knowledge and experience working with you.

QUESTION: *What is the Proposal Profession Impact Paper (PPIP)? How should the candidate go about preparing for and developing the PPIP?*

The [PPIP is a set of PowerPoint slides](#) you fill out, with a focus on two specific areas:

- What you are doing to continue developing as a proposal professional
- What impact you have had on our profession

To complete the first part of the PPIP, you should think of all the ways you have increased your knowledge, understanding, and effectiveness in the proposal environment. There are a variety of ways to show development, including taking, designing, or teaching courses; developing a new process; leading a review team – those things that have resulted in a clearer understanding of a best practice.

To complete the second part of the PPIP, you need to describe an effort that has had a positive impact on the profession. This can be through an innovative approach to developing a proposal, reducing proposal costs, or creative ways to more effectively use resources. It also can be through a major contribution to the profession such as writing a proposal manual or public speaking on aspects of proposal management. The end result must be that you have furthered the profession through your efforts.

You should use metrics if they are available to show the positive effect you have had on proposal management. Qualitative results also can be meaningful to show improvement (for example, improved morale, reduced turnover, or normalized work/life balance within the team).

It is important to note that the efforts you describe in your PPIP cannot reflect your day-to-day work. Rather, you must show how you have gone above and beyond to make a difference in this profession.

QUESTION: *What is the difference between the PPIP and the PPAQ that is required for the APMP-Practitioner Level accreditation candidates?*

The PPIP is focused on your advocacy of proposal management best practices as evidenced through proof of continuing development and positive impacts on our profession. The PPAQ, which is completed at the APMP-Practitioner level – the previous stage of accreditation – is your assessment of your use of best practices.

QUESTION: *What is the purpose of the Assessor Panel interview?*

It serves two purposes. First, it allows you to formally present your information and participate in a Q&A session that enables the panel to better understand the PPIP and to ask additional questions about your efforts. This exchange is the first opportunity the assessors have to speak to you, and it is meaningful to establish a more personal relationship than what can be created through electronic data exchanges. Second, the panel interview allows you to show your presentation and extemporaneous speaking skills. Proposal managers must be able to present material skillfully to groups of people, and this format allows you to show how well you can convey material via public speaking.

QUESTION: *Who makes up the Assessor Panel? How are they selected?*

[APM Group](#) Assessors comprise the panel. Assessors must have completed the entire APMP Accreditation Program and achieved Professional certification. Further, they must take a training course, sit in on a panel

Continued on Page 7

Accreditation Summit Is APMP-Professional

Continued from Page 6

interview, and then co-lead a panel interview. This preparatory work is required to ensure the candidate's Assessor fully understands the evaluation criteria and process. Panel members are selected based on geographic location and availability.

QUESTION: *Is it preferred that the candidate do the panel interview in person as opposed to teleconference? Who is responsible for travel/telecommunication expenses to get the panel and candidate together?*

The forum for the panel interview depends on your location and the timing of the interview. Most often the panel interview is conducted via teleconference. If, however, you attend the [APMP Annual Conference](#) and wish to have the interview at that time, assessors will be available to conduct the interview in person. If the interview is conducted via teleconference, you will be provided with a toll-free number to call. Travel is not required to have the interview.

QUESTION: *What will be expected of the candidate during the panel interview? How should the candidate prepare for the interview?*

You will formally present the PPIP to the panel. This takes 15-25 minutes. The Assessor Panel will have already sent you a short list of questions specific to the PPIP (the Assessor Panel will have already reviewed the document). After the presentation, you will answer the questions provided earlier. At the completion of the formal Q&A session (about 10 minutes), the Assessor Panel will ask you two or three general questions.

To prepare for the interview, you should be familiar enough with the PPIP material to make an effective presentation and should have crafted answers to the questions provided.

QUESTION: *Who ultimately determines whether the candidate is conferred Professional Level accreditation? Must there be unanimous agreement among those charged with making the decision?*

The candidate's Assessor Panel will make the final decision on whether you can be certified at the APMP-Professional level. Remember, you will have already completed and passed both the APMP-Foundation and APMP-Practitioner levels, and the assessors will have already reviewed your PPAQ. As such, the interview will not be your first exposure to the Assessor Panel. Further, if you submit a PPIP that does not meet the qualification criteria, you will be notified and the interview will not be conducted.

There must be unanimous agreement among the Assessor Panel for a decision to be made.

QUESTION: *How is the candidate notified of the decision?*

Whether the interview is done in person or via telephone, you will typically be notified within 10-15 minutes. The Assessor Panel will convene for discussions immediately upon completion of the formal interview and come to a decision at that time. You will be notified immediately thereafter.

QUESTION: *What can the candidate do if accreditation is not conferred?*

The main reason APMP-Professional certification is not attained is if the PPIP is inadequate. If the PPIP is not clear enough to convey the appropriate information, you will be able to make adjustments and the process will continue. If the efforts you cite on the PPIP are not considered adequate to show true advocacy of best practices, you can reapply for Professional level certification after six months. This will allow you time to further develop your capabilities.

QUESTION: *What is expected of the candidate once accreditation has been conferred?*

You are required to gain 40 Continuing Education Credits (CEUs) every two years. These can be attained in a number of ways, including participation in APMP Chapter and National conferences, attending training courses, and publishing relevant articles. Serving on an APMP Chapter or National board of directors also qualifies for CEUs.

QUESTION: *What else should be noted about APMP-Professional Level accreditation?*

It is a great feeling when you receive your APMP-Professional certification. It is a validation of your knowledge and experience in proposal management, it can be a great discriminator for when you are competing for a job opportunity or promotion, it can be a great qualifier if you are seeking candidates for a proposal position, and it is already recognized as a meaningful achievement among proposal professionals. We fill a valuable role as proposal managers, and it is important to have a professional certification program designed to provide recognition of our valuable expertise.

Holly Andrews is the U.S. liaison for APMP's Accreditation Program. She holds the APMP-Professional™ level of certification, the highest level of accreditation conferred by APMP. Earlier this year she received APMP's prestigious [Fellows Award](#), designed to recognize those individuals who have made significant contributions to the new business acquisition profession. Ms. Andrews has more than 14 years of bid and proposal experience and has been active in APMP since 1995.

Please Remember to Bookmark:

<http://www.apmphouston.org>

<http://www.apmphouston.org/Links.html>

<http://www.apmphouston.org/Employment.html>

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Final Draft is the official newsletter of the Greater Houston Chapter of APMP. All content is copyrighted and authors retain rights. Unless otherwise stated, the views expressed in this newsletter are those of only the authors and do not necessarily represent the views of the Greater Houston Chapter of APMP or the APMP National Organization.

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

Continued from Page 1

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.

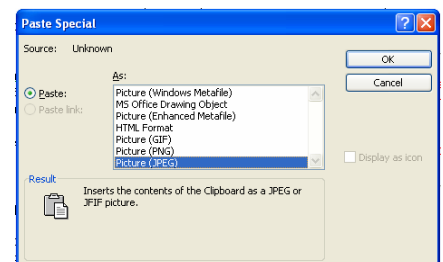
Manage the Size of Your Microsoft Office Documents by Using These Helpful Tips

Continued from Page 2

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.