

Association for Proposal Management Professionals



# News & Views

## Learn How to Deliver Presentations Effectively at Oct. 3 Chapter Meeting

### Save the Dates and Follow the Links ...

- [APMP Houston Chapter Meeting](#), Wed., Oct. 3, 3010 Briarpark Dr.
- [11th Annual Southern Proposal Accents Conference \(SPAC\)](#), Thurs., Oct. 11, Chapel Hill, N.C.
- [Southern California Chapter 5th Annual Symposium](#), Fri. Oct. 26, Anaheim, Calif.
- APMP Houston Board of Directors Meeting, Wed., Nov. 7, 3010 Briarpark Dr.
- APMP Houston Chapter Meeting, Wed., Dec. 5, 3010 Briarpark Dr.

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Sandra Zimmer, a long-time public speaking teacher and consultant, will discuss coaching better presentation delivery at the next meeting of the Greater Houston Chapter of the Association for Proposal Management Professionals (APMP) on Wednesday, Oct. 3.

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.

Ms. Zimmer will share some secrets she uses to coach technical experts to be more expressive and persuasive while presenting to prospective clients. Topics she will cover are:

- Helping presenters relax and develop presence



Sandra Zimmer will speak at the next chapter meeting. (Photo courtesy of [Self-Expression.com](#))

- Giving feedback that supports confidence
- Using stories to make presentations memorable and compelling
- Guiding presenters through a creative practice process

- Some coaching phrases that work like magic

Ms. Zimmer is the president of Sandra Zimmer & Associates, Inc., and the founder of [The Self-Expression Center](#). Ms. Zimmer and her staff guide people through experiential learning programs so they connect with their natural abilities to express and communicate in the world. She also has more than 30 years of experience with self-awareness and spiritual psychology. Ms. Zimmer has facilitated groups and individuals since 1976 at The Self-Expression Center, in companies, and in corporations.

Ms. Zimmer holds a master's degree in theater from The University of Houston, teaching certification in voice and speech from the renowned voice trainer Arthur Lessac, and a bachelor's degree in psychology from the University of Texas.

## Come Vote for Newsletter Name at Meeting

It's high time. After three issues (including this one), the newsletter for the Greater Houston Chapter of APMP will finally get a name.

Membership in attendance at the Oct. 3 meeting will have an opportunity to vote from a list of suggested names for our newsletter.

Voting will be held by secret ballot, and the winning name will be announced at the end of the Oct. 3 meeting.

## From the Prez: *Impact of APMP More Than You Think*

Welcome to the September/October issue of the Greater Houston APMP Chapter newsletter!

I recently realized just how much an impact APMP has had on my career as a proposal professional. I have found colleagues and friends that understand when I need to vent about a particular project manager or my excitement when I have helped my company win a key project. I also have found that the education value of APMP – whether it is through attending one of the Houston Chapter meetings, reading [The Perspective](#) or [The Jour-](#)

[nal of the Association of Proposal Management Professionals](#), or attending the [APMP International Conference](#) – has proven priceless. I find myself going back to an article or a presentation and bringing what I have learned forward to my peers within my company. I even found obtaining my Foundation level accreditation helpful in finding a new position.

I look forward to reading this newsletter as well. I know I'll find the article from John Sturtevant as informative as his presentation was at the August Chapter meeting. I also will find

helpful information in APMP Fellow Holly Andrews' article on the Practitioner Level process as I start working on that accreditation.

Recently, a colleague of mine mentioned she found that APMP provided much more valuable information to its members than other organizations she has belonged to. I hope that you find the same value in this newsletter and the other activities that the Houston Chapter offers.

But like any other organization, we are only as good as our members. So please feel free to send

an e-mail with your comments, whether it is about this newsletter, a meeting topic you would like to see, or even an article you would like to see published here.

As always, we look forward to hearing from you.

Regards,



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

### Our APMP Alliances:

- [Society for Technical Communication](#)
- [Contract Services Association of America](#)
- [Business Development Institute International](#)
- [Association of Cost Engineers](#)

### Please Remember to Bookmark:

<http://www.apmphouston.org>

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

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

<http://www.apmp.org/siteSpecific/job/jobBank.aspx>

<http://www.bd-knowledgebase.org>

## Google Yourself This Helpful Software That Will Help You Locate Specific Content

By David Wallis

How often are we expected to instantly find specific material hidden within gigabytes of past tenders?

It can be difficult, if not impossible, to search through everything you have on file, but that has changed with the introduction of Google Desktop.

This free software allows you to put Google's indexing and searching technology to work on your own files.

You can download the utility from [www.Google.com](http://www.Google.com). Once installed, the secret is to go to "Preferences" and add the network locations of your tenders to desktop's search. (By default, it



only looks at the C: drive).

Once you have pointed it to the places you need, it will "crawl" the files to build a searchable index. This process may take awhile at first, but it's well worth it.

Here's an example:

Our entire proposal server (>50 GB) was searched for "sustainable development." In

less than five seconds, Google Desktop returned 22 useful results.

Did I mention that it's free?

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.

# Welcome to the *BD-KnowledgeBase*<sup>TM</sup>

## What if you could ...

- Access key practices of the proposal and business development profession online
- Gain insight into how others in your profession are solving both the big and small problems they face every day
- Review articles and presentations that present key practices about a particular business development process step that you face
- Discover the skills and knowledge you need to improve the performance of you and your team
- Share new and innovative ideas with fellow practitioners from around the world using a Wiki

## It's available now by simply accessing the *BD-KnowledgeBase* at:

- URL - [www.bd-knowledgebase.org](http://www.bd-knowledgebase.org)
- User Name: **BDguest** (case sensitive)
- Password: **BDsite!** (case sensitive)

## How to find what you need

- Full "Google type" search of abstracts and artifacts
- Search by categories of metadata such as BD process phase, BD-CMM data, proposal manager competency, market, industry, and geography
- Complete instructions are available on the website

## Background

APMP, in collaboration with the BD-Institute, has created a body of knowledge for APMP members. The *BD-KnowledgeBase* identifies practices, process elements and tools that are generally recognized as key practices and hallmarks of the business development discipline. It provides:

- Managed resource for the key practices within the business development profession
- Foundation of facts and competencies for certification
- Reference guide with practical applications for the BD-CMM model

The *BD-KnowledgeBase* was introduced to members at the 2007 Annual Conference in Savannah, GA. This "jump-start" version was built from readily available sources such as the *Journal of the Association of Proposal Management Professionals*, *APMP Perspective*, and U.S., U.K., and regional conference presentations.

Information included in the *KnowledgeBase*<sup>TM</sup> met three criteria:

- Be considered useful to APMP members and other BD professionals
- Represent and support BD-CMM key practices
- Complement the APMP Certification Syllabus

## For more information contact:

Charlie Divine  
Chairman, *BD-KnowledgeBase*<sup>TM</sup> Working Group  
[cdivine@bd-institute.org](mailto:cdivine@bd-institute.org)

# Clear Writing Possible With These 10 Ideas

*Editor's Note: The following article on clear writing was written by John Sturtevant, founder of [The Writing Workshop](#). Mr. Sturtevant was the guest speaker at the August APMP Houston chapter meeting. This article is being reprinted with permission.*

By John Sturtevant  
[The Writing Workshop](#)

## Clear Idea #1: Be Clear

The essence of clear writing is to *focus on being clear*.

So often, we simply pour out everything on our minds – in any which way – and dump it in our reader's lap. The next time you're about to reach for the "send" or "print" key, pause and ask yourself, "Are my ideas clear? Will my reader understand this?"

## Clear Idea #2: Define Your Objective

We're taught that it's important to fill up pages, impress people, be right. Those goals will rarely (make that never) result in clear thinking or clear writing. Instead, define a clear objective for writing your report, proposal, e-mail, or letter.

Write a sentence like this and tape it to your monitor to remind you why you're sitting there tapping on the keyboard: "After reading my report, my manager will approve my budget." Then, ask yourself, "Do all my ideas support that goal? Am I giving my reader everything she needs (and only what she needs) to compel her to approve my budget?"

## Clear Idea #3: Know Your Reader

I mean *really* know your reader. Not just a name, or a demographic, or a subscriber number. But who they are, how they think, what's important to them, and why and how and



John Sturtevant, founder of [The Writing Workshop](#), makes a key point during a presentation he delivered to the Greater Houston Chapter of APMP on August 1.

when are they readers of your stuff. Learn to speak your reader's language.

The great crime writer Elmore Leonard said it perfectly when asked why all his books become best sellers: "I leave out the parts people skip." That's genius. He has his material down cold and an accurate bead on his reader's expectations. And he delivers the suspenseful shot they so crave.

## Clear Idea #4: Plan, Write, Revise, Edit

In that order. We've all struggled with the editor in our heads who won't let us move on to sentence No. 2 until we've polished sentence No. 1.

Send your editor to Cancun for a relaxing few days on the beach.

There.

Now you can write to your heart's content. Just get your ideas down. Turn off that annoying spell checker. (It doesn't know the difference between "form" and "from" any way ... oops, I mean anyway.) You can fiddle with the sentences later. Choose different words. Rearrange things. Delete stuff. Oh, and follow the advice in Clear Idea #8 instead of using spell checker.

## Clear Idea #5: Information Is Useless

The information superhighway. How quaint. Technology, tempered by wisdom, has evolved the information age into the knowledge age.

Most people despise data and crave context. Your job as a communicator is to show your

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# Clear Writing Possible With These 10 Ideas

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readers why what you think is so vitally important is so vitally important to *them*.

We all ask, “What’s in it for me?” Give your readers relevance, context, and meaning.

## Clear Idea #6: Perfectly Sliced Tomatoes

Remember the Ginsu Knives commercials that ran on late-night TV? Those people sold millions of dollars worth of knives thanks to seven simple words. “Look how easily it cuts a tomato.”

They showed us what we really wanted. Perfectly sliced tomatoes, not a knife. Looking at that guy slice through those rosy beefsteaks, I could almost taste their wonderful sweetness. And so could millions of other people who ordered Ginsu Knives.

People make decisions based on *benefits*, not features. The next time you’re pondering how to start a letter, or planning a presentation, or editing your Web site, think about the people who have to listen to you. And imagine perfectly sliced tomatoes.

## Clear Idea #7: Transparent Writing

Clear writing is like a window. Your ideas are the view. You don’t want your reader to think, “Gosh, that’s a clever sentence.” Instead, your reader ought to be thinking, “Wow, this guy makes sense. I want what he’s selling.” Don’t let your words obscure your ideas.

## Clear Idea #8: Read Your Writing Out Loud

Before you send your document, print it, get up from your desk, and walk down the hall reading it out loud.

A few things will happen.

First, you’ll get bored. Bored!

Man, if you’re bored by your own writing, just imagine how triple-bored your reader will be!

Second, you’ll get confused. That’s because your sentences contain too many ideas. How many ideas should each sentence contain? One! Just one.

Third, you’ll run out of breath while reading. That’s another signal that you’re sentences are too long (or you need to jump on the treadmill three times a week).

And finally, you’ll catch typos you’re ... oops, your spell checker missed.

Strive to thrill *yourself* with what you write.

## Clear Idea #9: Find Time to Think

Have you ever been stuck in traffic? Do you like those moments? No?

Well, I invite you to cherish those opportunities!

That’s right. The next time you’re stuck behind the paving crew, turn off your radio, shut down your iPod Touch (gosh, they’re cool!), mute your cell phone (you’ve got voice mail!), and think.

Here’s the thing. Being stuck in traffic is one of the few moments during our waking hours when nobody expects anything from us (except to move forward inch by inch). Seize the opportunity!

And while you’re thinking, ask yourself a bunch of simple questions like the ones you see among these Clear Ideas. The fact is, the best solution will come to you when you’re not trying to solve the problem. Try it and see for yourself.

It’s a Zen experience.

## Clear Idea #10: Ask Simple Questions

Here are a few to get you started. “Who? What? When? Where? Why? How?” Your reader is asking those questions as he reads your letter, memo, report, proposal, e-mail, or analysis. If you don’t answer them for him, he’ll get distracted and bored and toss your proposal in the trash after a couple of paragraphs.

And here’s the best question of all: “So what?”

After you write each sentence, think about what it means, the *idea* in the sentence, and ask yourself: “So what?”

The answer is always a much more compelling idea.

John Sturtevant has been described as “America’s Expert on Clear Writing™.” He has helped thousands of business people around the world learn to communicate their ideas clearly and persuasively. John created [The Writing Workshop](#) after teaching business writing at Harvard Business School and The European School of Economics in Rome, Italy.

## Houston Chapter Members in the News

**Editor’s Note:** *Our newsletter will publish your news of recent achievements in the proposal profession. If you have been promoted, started a new position, attended a proposal workshop, or achieved a level of APMP certification, please provide us the details. You may forward your member news items to [mjk77@yahoo.com](mailto:mjk77@yahoo.com).*

**Jeannette Waldie** recently joined the Houston marketing department for TCB, Inc., a division of AECOM, as senior marketing coordinator. TCB provides regional markets with collective expertise in a broad range of services.

# Sage Advice for Completing Self-Assessment

## APMP Fellow Explains Standards/Guidelines, Answers Questions

*Editor's note: The following article is the second of a two-part series on the APMP-Practitioner™ accreditation level and the Proposal Practitioner Assessment Questionnaire™ (PPAQ™). Part 1 of this series can be found on [page 5 of the July/August edition of the Greater Houston Chapter of APMP newsletter](#).*

**By Holly Andrews, PPF.APMP**  
APMP Fellow

The [PPAQ Standards and Guidelines \(S&G\)](#) provide the best tool for preparing for the PPAQ. The S&G is divided into five columns and covers the following six Key Competency Areas (KCAs) that need to be addressed in the PPAQ:

- Information Research and Management
- Planning
- Development
- Management
- Sales Participation
- Behavior and Attitude

Within each KCA there are specific listed competencies (first column) and a description of how those competencies will be assessed (second column). This allows candidates to determine how much experience they have in each of the areas.

An important element of the S&G is the third column, "Application of Experience or Delivery of Training, Mandatory/Desirable." Of the various criteria to be assessed in each competency, some require that the candidate either have experience or have delivered training in that specific area. Because these are mandatory requirements, I advise candidates concentrate on these areas first to ensure the requisite experience/training delivery has been

| PPAQ Assessment Guidelines                 |   |   |                     |  |
|--|---|---|---------------------|--|
| Competency                                 | Assessment Criteria   | Application of Experience or Delivery of Training Mandatory/Desirable | Training Received   | Assessor Guidelines  |
| <b>Information Research and Management</b> |   |   |                     |  |
| <b>Information Gathering</b>               | Define and drive the information collection strategy.<br>Analyze and relate information from different sources to draw logical conclusions.<br>Drive and coach others to use existing internal and external data sources and identify information gaps. | D<br><br>M<br><br>D   | D<br><br>D<br><br>D | Candidates <b>must</b> be able to evidence the following in this competency<br><br><b>ALL Mandatory (M) areas</b><br><br>+<br><b>1 x Desirable</b> |

The PPAQ Standards and Guidelines provide APMP-Practitioner accreditation candidates the best tool for preparing for the required self-assessment, says to Holly Andrews, an APMP Fellow who serves as the U.S. liaison for APMP's professional accreditation program.

achieved. There are also a number of other criteria listed as "desirable" where the candidate can either have experience in that area, have delivered training in that area, or received training in that area. The S&G indicates how many of these "desirable" competencies the candidate must have.

The fourth column indicates where it would be desirable to show the candidate has had training. There are no mandatory training requirements, but if someone has had training, it strengthens their position.

Finally, the fifth column describes how many of the desirable areas must be addressed with experience or training delivery, in addition to all of the mandatory areas. So, in looking at the first Competency Area, "Information Gathering," you can see that of the six Assessment Criteria, the candidate needs only Experience/Delivery of Training in two criteria areas, one mandatory and the other of his or her choice.

I also suggest that candidates download the Microsoft® Word version of the PPAQ. They can take their time filling it out, quickly jump around from question/answer to question/answer (this is a bit more difficult in the online version), and easily run word counts to ensure they are within the required limits. There is a 225-word limit for answers to the 35 questions, and a 150-word limit for the wrap-up questions that come at the end of each KCA section.

Lastly, the [APMP-Practitioner Web site](#) indicates that candidates should be prepared to spend about four to five hours preparing their PPAQ. I think this amount of time is reasonable for candidates who have around three years of experience. For those who have been in the business for several years, though, the length of time could be more like 10-20 hours. The longer they've been doing this work, the more experience they need to consider to

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# Sage Advice for Completing PPAQ Successfully

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determine which examples to use to show their proficiency.

The same thing goes for training. For people who have been proposal managers for a while, a good amount of their training was probably done years ago, and it can be time consuming to review old training materials to determine exactly when and how they were trained in the various aspects of proposal management.

**QUESTION:** *What advice can be suggested regarding the PPAQ questions that ask how candidates intend to improve themselves and others related to specific Competency Areas?*

This is where candidates can list what training they'd like to take to increase their knowledge in certain Competency Areas. Candidates should consider if they would like to create a training course for others in their organization. They also can consider making a presentation at either their APMP chapter meeting or at the APMP Annual Conference. They might want to write an article for the [APMP Perspective](#) or the [APMP Journal](#). Perhaps there is a book they'd like to read that will enhance their knowledge in a particular area.

Any and all of these options can both increase a person's awareness and understanding of elements of proposal management and, in most cases, help improve others' skills. Don't forget, everything suggested here is also worth Continuing Education Units (CEUs).

**QUESTION:** *What if a candidate may be weak or lacking in certain mandatory assessment criteria?*

There is no time limit on submitting the PPAQ. If candidates find that they don't have the requisite experience in an area, they can take the time they need to gain that experience. For some people, they may have had training in the area but never had an opportunity to engage in that particular work. If the

work is normally done by someone else in the organization, the candidate could ask his or her manager for the opportunity to work with that person to experience first hand how the task is done. If the task is not typically performed, perhaps the candidate can suggest introducing it to the organization.

**QUESTION:** *Will receiving formal training or coursework be able to substitute actual experience for any of the mandatory or desirable assessment criteria?*

Receiving formal training or coursework can substitute for actual experience for those competencies listed as "desirable" in the S&G. Mandatory competencies require the candidate either have actual experience or have delivered formal training.

**QUESTION:** *How might APMP or the candidate's assessor be able to work with the candidate to overcome deficiencies in mandatory assessment criteria?*

APMP has a Body of Knowledge that the APMP Fellows have reviewed and vetted as representing best practices as endorsed by APMP. The materials in the Body of Knowledge are valuable resources for candidates to use to help understand and learn about certain aspects of proposal management. Further, APMP Fellows have been so acknowledged due to their contributions to our profession. As Fellows, they continue their commitment by being advisers and mentors to the APMP membership. Candidates who need help should contact any of the Fellows to seek advice and support. You can find a list of the 2001-2006 Fellows Awardees on [page 60 in the Spring/Summer 2007 APMP Journal](#). The 2007 Fellows Awardees are listed on [page 3 in the APMP Perspective, Volume 17, No. 2, Spring 2007](#).

**QUESTION:** *Once the PPAQ is completed and submitted, what's involved in a typical evaluation of a PPAQ?*

The assessors will review the PPAQ against the guidelines to ensure all of the mandatory areas and the requisite number of desirable areas have been addressed. While there is some subjectivity to the evaluation, the clearer the content, the easier it is for the assessors to determine how well the candidate has met the requirements. This assessment takes six to eight weeks, after which the candidate will be notified of the results by the [APM Group](#). If the assessors have questions that require some clarification, they will seek additional information from the candidate. If the answers simply do not meet the requirements, the candidate will be notified that his or her PPAQ was not passed but they will have the opportunity to resubmit after a six-month waiting period.

**QUESTION:** *Can a candidate request a specific APMP assessor? If not, how are APMP assessors assigned to candidates?*

Assessors are assigned based on availability, so it is not possible for candidates to request a specific assessor. The APM Group brings on assessors as the need increases. Eventually we will have assessors located throughout the world, as more of our international membership become involved.

**QUESTION:** *What typically happens during the conference call between the APMP assessor and the candidate's nominated reference?*

The reference is asked to confirm the candidate has at least three years of experience in a bid and proposal environment. The reference will also be asked to address certain aspects of the candidate's PPAQ, most especially the behaviors and attitudes exhibited as a proposal practitioner.

**QUESTION:** *What goes into making the final decision on whether to award APMP-Practitioner accreditation?*

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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](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.*

## Sage Advice for Completing PPAQ Successfully

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The decision is based on how comprehensive the PPAQ is, that it adequately conveys the candidate has the required experience in each area, and that the candidate has been working in the profession for at least three years. Part of the role of a proposal manager is to communicate well, so the clarity and completeness of the PPAQ is important.

**QUESTION:** *What recourse does the candidate have should he or she not be awarded APMP-Practitioner accreditation?*

If the candidate feels that the assessment was not fair, an appeal may be submitted to APMP. This must be done within three months of receiving the result, and the candidate must provide reasoned arguments for the

feedback they received from the assessor(s).

**QUESTION:** *Any other comments or advice related to the PPAQ or the PPAQ evaluation process?*

While the process for completing the PPAQ may seem daunting at first, you really do get into the flow of it. Be mindful of how much you write at first. I spent three to four hours editing my responses to fit the word count. I would suggest using bullets wherever you can rather than writing long paragraphs. That way you can delete those bullets that don't present as strong an example as others. And, if you have the space, you can then elaborate as needed. Further, because there is a word limit for each response in the PPAQ, it is far better to elaborate on the "mandatory" experience than take time and space to discuss the "desired" areas of experience.

Take your time. If you haven't worked in an area where experience is mandatory, then work with your manager or create an environment where you can develop those skills. Be sure you have included the best of the best of your experience. Think about all of the things you can do to increase your knowledge and share it with others. Get creative and keep track of what you've done as you will need that for your PPAQ, and you can get CEUs for the effort.

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. Holly has more than 14 years of bid and proposal experience and has been active in APMP since 1995.