

The Association for Proposal Management Professionals - Houston



Final Draft

Get Ready for 'Proposal Pictionary' Visual Design Presentation Part of Feb. 6 Meeting

Save the Dates and Follow the Links ...

- [APMP Houston Chapter Meeting](#), Wed., Feb. 6, 3010 Briarpark Drive
- APMP Houston Board of Directors Meeting, Wed., March 5, 3010 Briarpark Drive
- APMP Houston Chapter Meeting, Wed., April 2, 3010 Briarpark Drive
- [19th Annual APMP International Conference and Exhibits](#), Tue.-Fri., May 27-30, 2008, Rancho Mirage, Calif.

Colleen Jolly, a proposal graphics designer and consultant, will lead a hands-on visual design presentation at the next meeting of the Greater Houston Chapter of the Association for Proposal Management Professionals (APMP) on Wednesday, Feb. 6.

The meeting will begin at 11 a.m. at ABB, [3010 Briarpark Drive](#), Houston. Admission is \$20 for members, \$25 for nonmembers, and \$15 for students (student ID required), and includes lunch. Seating is limited.

Ms. Jolly's presentation will focus on visually designing proposals to maximize audience perception and give an introduction to the conceptualization process that shows proposal professionals how to turn their ideas into clear, communicative, compelling visuals. After presenting these concepts, Ms. Jolly will lead a hands-on learning activity that is similar to the popular drawing game Pictionary.

She said that meeting participants will take with them a better understanding of how to turn their words into pictures, be able to choose the right color palette, and know how to get better graphics.



Colleen Jolly, a principal at 24 Hour Company, will speak at the Feb. 6 chapter meeting.

According to Ms. Jolly, research has shown that visuals increase success rates up to 43 percent, communicate 60,000 times faster than text, and give ideas with 22 times more impact than text alone. Yet, so many sales proposals contain few, if any, graphics.

Ms. Jolly is a principal of [24 Hour Company](#), a professional proposal graphics and production company based in the Washington, D.C., area. According to its Web site, 24 Hour Company is "built around the unique needs of companies whose success depends on winning the most important government contracts."

As a proposal graphics consultant,

Ms. Jolly has helped her clients win more than \$10 billion in business. Additionally, she is responsible for book composition and cover design for [The Journal of the Association for Proposal Management Professionals](#) (APMP Journal) and is a frequent contributor to the publication. Ms. Jolly is also a docent at the Corcoran Gallery of Art in Washington, D.C., and is also an award-winning fine artist. She has a bachelor's degree in English and studio art from Georgetown University.

Win a Graphics Design Book at Feb. 6 Chapter Meeting

Meeting attendees will have a chance to win the highly acclaimed book [Do-It-Yourself Billion Dollar Business Graphics: 3 Fast and Easy Steps to Turn Your Text and Ideas Into Graphics That Sell](#).

The prize, compliments of author Mike Parkinson and 24 Hour Company, includes the book and a "virtual CD" that provides the book owner free online access to editable graphics, templates, and PowerPoint backgrounds.

A review of Mr. Parkinson's book appears on [page 5](#) in this issue of *Final Draft*.

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From the Prez: 2008 Promises to Be a Great Year

Welcome to 2008! I believe it is going to be a great year for the organization both internationally and locally.

On the International Board, Charlie Divine was elected as the Education and Accreditation Director, David Bol was elected Chief Operating Officer, and Dick Eassom is now Chief Executive Officer. Also, plans are well under way for the next In-

ternational Conference, "Global Positioning Strategies for Capture and Proposal Professionals," to be held in Rancho Mirage, Calif., from May 27-May 30, 2008.

On the local front, I am pleased to announce that Kim Muckelroy has joined the Greater Houston Board as the Membership Chair. Additionally, Tanya Willis, our Program Chair, has done a great

job lining up presenters for the first half of 2008.

Interest in our chapter, and the organization as a whole, has grown tremendously over the past year, and I anticipate that trend will continue as we provide a place for you to connect with others and grow in your field as a proposal professional. So please join us for a meeting sometime soon!

Regards,



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

How You Can Insert Multiple Pages from PDF into Word

By David Wallis

Next time you have a proposal where you have to insert a separate document (i.e., permits, certificates, or technical data sheets), try this trick:

- Convert the document to PDF format, then open it in Acrobat and do "File, Save As."
- Select "JPEG" and configure the "settings" to use maximum resolution.
- This will save a single JPG file for each page of the document.
- Next, go back to your main proposal Word document and click on the space where you want to insert the pages.
- From Word's menu bar, select "Insert, Picture, From File" and navigate to the JPGs you made.

- You can select all of them at once, and it will insert all the pages as graphics.

Please note: for some reason Word always inserts the last page first, so you will need to cut it and paste it at the end.

By incorporating "inserts" within your main document, you keep a good flow to the document and avoid disrupting page breaks. You also can add a border to the graphics to further emphasize the "page within a page" effect. This trick is very effective for short inserts which you would otherwise have to remember to print and insert manually. Be careful, however, not to add more than 10-20 pages this way as the full-page JPGs will increase the file size of your Word document.

Converting PDF to Word

People frequently ask if it is

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This is an example of saving PDF page as JPG to use as "page within a page." (Note: In the case of technical paper, make sure you have permission to include the paper and use the proper references.)



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And Now, A Few Words on Graphics, Logo Use

By David Wallis

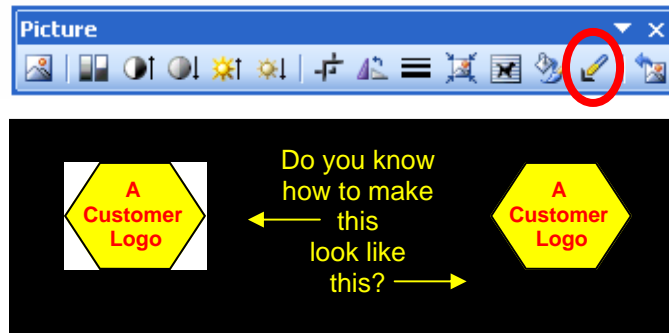
Ever see those annoying white boxes around your graphics? There's an easy way to fix that, provided it is a supported graphics type.

Simply click the unwanted color using the "Set Transparent Color" tool on the "Picture" toolbar.

Now Let's Talk Customer Logos

The use of customer logos within tender responses can be a touchy subject. For some, including the customer's logo shows personalization and customized effort. However, others stay away from this so as not to infringe on the customer's rights or imply any association which does not exist.

The only real rule is to never use a logo without the written permission of the customer!



When using Microsoft Word, use the "Set Transparent Color" function on the "Picture" toolbar (top left) to eliminate the white background of imported graphics.

Assuming you have their permission, make sure the logo you use is accurate and high quality. A customer may approve use of its logo as an identifier in the header or footer, or on the binder cover, but never group the customer logo with your company's logo.

IF you have permission, you often can capture

a high-resolution version of the customer's logo from its annual report published as a PDF file on the corporate Web site.

If do not have a high-resolution version, one trick that works well (again, only if you have

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Houston Chapter Appoints New Membership Chair

By Michael Kent, AM.APMP

Final Draft Editor

Kim Muckelroy, a 15-year veteran of proposal and technical documentation, has been appointed to the vacant Membership Chair position on the Greater Houston Chapter of APMP's Board of Directors. The appointment was announced during the last chapter board meeting, held Jan. 9.

According to chapter bylaws, "The Membership Chair shall be responsible for soliciting renewals of membership and new members each year and for other membership issues, and for resolving any discrepancies with the mailing addresses provided by the National APMP organization."

Additionally, "The Membership Chair will also provide the (Chapter) President with the number of members who attended programs during the fiscal year and other significant statistics for year-end reporting required by the National APMP. The Membership Chair

will also coordinate all recruiting efforts of new members to the local chapter."

Ultimately, Ms. Muckelroy said she wants reach out to prospective members to spread the word about APMP.

"I hope to share the benefits of becoming a member and attending meetings with other individuals in the proposal profession," she said. "I look forward to helping our chapter grow in the future."

Ms. Muckelroy started attending Houston chapter meetings more than a year ago. During that period, she became acquainted with some of the Houston board members.

"It is a great place to meet other proposal professionals – to share and learn from the best in the business," she said. "Also, the speakers at our bimonthly meetings add value by sharing their special niche within the proposal realm."

Ms. Muckelroy is currently a proposal coordi-

nator at [Dril-Quip, Inc.](#), which manufactures offshore drilling and production equipment. Her role includes coordinating and tracking all proposals and budgetary quotes along with client presentations for her department.

Previously, she was employed by [Global Industries, Ltd.](#), a marine construction service company, as a technical writer with emphasis on proposals. She also was employed by Amoco Production Company (now [BP](#)), where she led small project teams and worked on the trading room floor.

Ms. Muckelroy currently is working toward a degree in occupational leadership/management. Additionally, she is studying to take the exam for the [APMP-Foundation™](#) level of accreditation.

In her spare time, Ms. Muckelroy enjoys spending time with her husband and two teenage daughters. She also volunteers for the Houston Sheltie Sanctuary, a nonprofit animal rescue organization.

Finally, a ‘Cookbook’ for Proposal Graphics

Do-It-Yourself Guide Breaks Down Concepts, Offers Great Examples

Editor’s note: The following article is a book review that initially appeared in the [Spring/Summer 2007 edition](#) of the APMP Journal. This article has since been revised by the author and is being republished with permission.

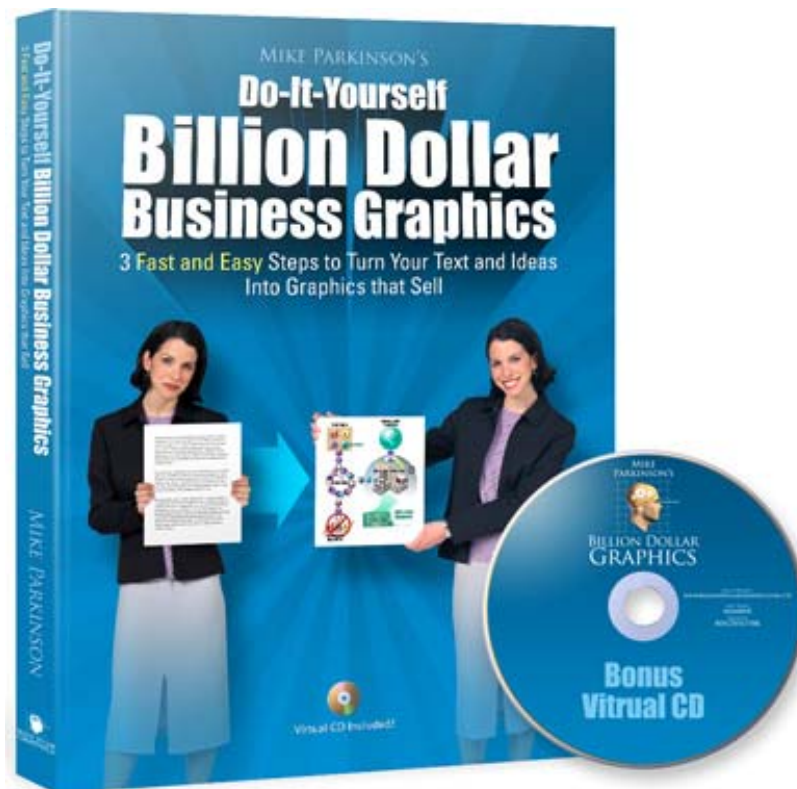
By Beth Wingate, AM APMP

President, National Capital Area Chapter

I’m a PBS “junkie” and addicted to America’s Test Kitchen (when I’m not slaving over a hot proposal)! I’m fascinated by the way these SMEs take disparate ingredients, decide how to combine them, and end up with a delectable “product” by the end of a half-hour segment. Of course, there’s a lot of work that happens behind the scenes to develop the best practices before they end up with this seemingly effortless “product.”

In the same way, Mike Parkinson has done the research and hard work and then assembled his best practices from 20 years of in-the-trenches experience into his new book, [Do-It-Yourself Billion Dollar Business Graphics: 3 Fast and Easy Steps to Turn Your Text and Ideas Into Graphics That Sell](#). He gives us the “cookbook” for creating winning, persuasive graphics from scratch. While many self-proclaimed experts will explain how to design a graphic using particular software, few have Mike’s credentials – thousands of graphics developed worth billions of dollars in profits for his clients.

Drawing upon his formal design training and experience as one of the owners of [24 Hour Company](#) (a proposal graphics design firm), Mike has assembled a fantastic guide to develop clear and targeted graphics. Since the 1980s, I’ve read thousands of dollars worth of books on developing graphics, and this is the best resource I’ve seen. It’s full of step-by-



Author Mike Parkinson provides step-by-step instructions and how-to tips that will help proposal professionals significantly improve their graphics.

step instructions and how-to tips that will immediately improve the quality of your work – whether this is your first graphics project or your thousandth. In my 21 years of developing proposals, this is one of the only books that presents real-world techniques to turn my ideas into effective graphics (the others were also written by Mike). I have used Mike’s books almost daily since they were published. My personal copies look like hedgehogs with all the post-it flags sticking out from pages of interest!

Do-It-Yourself Billion Dollar Business Graphics begins with an introduction into the influence of visual literacy, how we retain information using visual elements, and how graphics affect us cognitively and emotionally. The first chapter discusses the two tiers of communication for all graphics – surface/cognitive and subsurface/emotional. It points

out how many visuals are designed to affect us emotionally (think patriotic images of flags and eagles). Most importantly, this chapter introduces the three-step process for guaranteed successful graphics – Know the P.A.Q.S., Conceptualize, and Render.

Mike breaks down Chapter 2 (Step 1) into four pieces of information (P.A.Q.S.) that comprise 50 percent of the conceptualization process and that you **MUST** have for a successful graphic: (P) know your *primary objective*, (A) know your *audience*, (Q) know/answer your audience’s *questions* so your graphic can realize its primary objective, and (S) know the *subject* matter. This chapter concludes with a useful questionnaire to help you gather information to develop your graphics.

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Finally, a 'Cookbook' for Proposal Graphics

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To conceptualize communicative and compelling graphics, Mike uses four methods of communication in Chapter 3 (Step 2): literal, substitution, quantitative, and assembly. In addition, he presents 13 design techniques using real-world examples. Three chapter tests help reinforce your understanding of the concepts.

Chapter 4 (Step 3) discusses strategies for rendering your graphics and presents examples to back up its assertions. For those who are not graphic designers but need to communicate how a graphic should appear, Mike provides fundamental principles to guide your trained designers in the rendering process.

In Chapter 5, Mike contends that graphics fail for three reasons – too complex, unclear, and/or poorly rendered – and uses examples with call-outs to highlight problems in each graphic. He then establishes seven helpful rules to create successful graphics.

Chapter 6 provides *more than 200* real-world examples that Mike and 24 Hour Company developed for winning proposals and presentations (content changed to protect clients and permission provided). It contains samples of literally any type of graphic you might need

for your proposal or business development presentations. The full-color graphics demonstrate proper color combinations and save hours of development time because you can show your teammates what you mean by “we need to illustrate the interrelationship of data elements and how they work together to create the larger XYZ...”

Each book includes free editable graphics and templates for your next proposal on an ever-updating virtual CD that can be accessed anywhere, anytime via the Internet.

In the end, Mike encourages the reader to begin using his techniques and to practice them in daily communications as a “powerful means to achieve your goals.”

Along with the books, *Billion Dollar Graphics* offers two DVDs, Billion Dollar Graphics Source Art, containing royalty-free, editable source art found in the books. These layered Adobe Photoshop and Illustrator files can save hours of rendering time by allowing you to tailor the graphic for your needs. You can export the finished graphics into PowerPoint, Word, multimedia/Web applications, and other layout applications. The DVDs are clearly organized and have an easy-to-use (always a key point with me in a fast-paced proposal shop) browser-based organizer so

you can view thumbnails and larger-sized images to obtain their file name. Both DVDs come with free electronic copies of both books, so you can reference them while working on your computer!

In summary, the book is clear and understandable. The research and best practices that Mike has used to develop these books are solid and hard hitting. Whenever my proposal teams struggle to find a concept, we open the book and the graphic is kick-started.

My team and I also attended Mike’s conceptualization training, which reinforces the ideas and strategies from the books. It was eye-opening and entertaining. With the books, DVDs, and training, there simply are no more excuses for not knowing how to illustrate your points and produce winning graphics!

[Beth Wingate](#) currently is president of the [APMP National Capital Area \(NCA\) Chapter](#). She previously served as editor of NCA’s newsletter, the *Executive Summary*, in 2006 and 2007. She has almost 21 years of experience in proposal development. Ms. Wingate is a senior proposal manager and marketing communications manager for [Lohfeld Consulting Group, Inc.](#), and formerly proposal center director for [Management Systems Designers, Inc./Lockheed Martin MSD, Inc.](#) She has a bachelor’s degree from The College of William and Mary.

For Future Use ... Bookmark These Helpful Web Pages:

<http://www.apmphouston.org>

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

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

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

<http://proposalcafe.com>



To Quantify or Qualify?

Tim Budzik (left) makes a key point during the Dec. 5 membership meeting of the Greater Houston Chapter for APMP. Budzik delivered a presentation on “Quantifying or Qualifying Your Bid/No-Bid Decision,” discussing the use of a blended approach of quantifying and qualifying bid/no-bid decisions. Budzik previously delivered his presentation at the 2007 APMP Conference and Exhibits.

And Now There Are 2 in the Lone Star State

New Central Texas Chapter Joins Houston by Earning Charter

By Michael Kent, AM.APMP

Final Draft Editor

For quite some time now, Houston has been the base for Texas' only official APMP chapter. That is no longer the case.

Ladies and gentlemen, please welcome the brand-new Central Texas Chapter of APMP, which was approved for a charter by the National APMP Board of Directors on Jan. 17.

The new chapter will have its [first official meeting](#) on March 6 at Tres Amigos, [13435 N. Highway 183 in Austin](#). The inaugural meeting will start at 6 p.m.

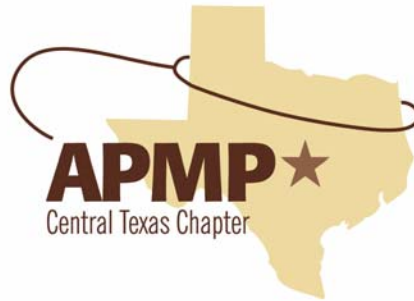
Nominated to become the Central Texas Chapter's first president is Amy McGeady, a 10-year proposal professional who manages [her own business](#) and has a doctoral degree in political science. Dr. McGeady also was the catalyst to get the chapter off the ground for Austin and San Antonio area APMP members, who up until now were affiliated primarily with the Greater Houston Chapter.

Depending on a member's location in the Austin/San Antonio area, Houston is at least 150 miles away, making it impractical to make a trip for chapter meetings. Likewise, having "satellite" Houston chapter meetings in Austin or San Antonio doesn't make sense, either.

Dr. McGeady knew something had to be done.

"I've always had a gut feeling that there were a good number of proposal professionals in Austin, but we are not a cohesive community," she said. "We honestly don't know each other very well."

But that didn't stop her. Dr. McGeady decided to get busy and survey APMP members and other proposal professionals based in Austin, San Antonio, and surrounding areas to deter-



The Central Texas Chapter sports a new logo.

mine if there was sufficient interest in having a local chapter. Sure enough, she was able to enlist the help of fellow members Dee Hutchison, Steve Beeler, Martha Hallman, Mark Wigginton, Michelle Petty, and Lauren Dumosch to form a planning committee. Two nonmembers, Julie Wickert and Mary Anne Bernard, also joined the planning committee.

"The first time the planning committee met, we clicked instantly and were so glad to find one another," Dr. McGeady recalled. "That drive for community has kept us going."

From that point, it became a matter of working toward getting a charter application submitted and approved. Part of the process was getting a list of area APMP members and holding planning meetings to discuss details.

"It took us about six months," Dr. McGeady said. "Jeannette Waldie (Greater Houston chapter president and Central U.S. Regional representative) has been incredibly supportive and helpful. She helped me to understand all the steps involved in applying for a charter, and provided constant encouragement and support."

Right now, the planning committee's core has been drawn from Austin. Dr. McGeady hopes that eventually members from the San Antonio area will start to become involved.

"We need to attract a strong group of interested people, and then facilitate worthwhile meetings that provide useful information, tools, and leads," she said. "In such a stressful, deadline-oriented profession, it's hard to get people to come to meetings. We hope that if we make the meetings fun and informative enough people will want to take an hour or so out of their busy lives to spend time together learning new tricks and sharing challenges and solutions with one another."

For now, the fledgling Central Texas Chapter is focusing on short-term objectives. Four chapter meetings are tentatively scheduled for 2008. From these meetings, Dr. McGeady hopes the chapter's membership base will grow sufficiently to sustain the organizational structure.

Though she is concentrating on short-term goals, Dr. McGeady will not hesitate to say she has a vision for the Central Texas Chapter.

"I want us to bring in great speakers who provide real value to our members, sharing lessons learned and new best practices," she said. "I want the Central Texas Chapter to be an active chapter with strong networking opportunities, where people share ideas freely and help one another find solutions to new challenges. I'd like us to be the sort of organization that always welcomes new members and puts them at ease."

"During our six months of planning, I've met so many new people and reignited friendships and professional relationships with people I've known for years. I'd love for my friends and colleagues who run proposal centers in Austin and San Antonio to be able to find great local talent more easily; and for my friends searching for professional growth or new jobs to connect more easily with opportunities."



2007-2008 Board of Directors

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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.***

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

A Few Words on Logo Use

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permission) is to copy the customer's logo from a document on its Web site. The logo that appears on the customer's home page will be low resolution, so don't use it. A better approach is to navigate to the customer's annual report, which will usually include its logo on the first or last page. The annual report is often included as a PDF file, which will let you use the "select graphics" tool to copy the logo. Make sure when doing this that you zoom in to 300 percent or more on the page view first so you copy the logo at its highest resolution.

Again, this tip is not intended to endorse or approve use of customer logos ... you still have to ask the customer.

How You Can Convert PDF Files Into Editable Word Documents

Continued from Page 2

possible to convert a PDF file back to Word. For the most part, no. That would defeat part of the purpose of the PDF format in the first place as it is often used to transfer an uneditable electronic "print out" of a document.

However, it is not uncommon to need to copy and paste items from PDF. For example, we frequently get requests for tenders from a customer which include questions that we would like to reuse in Word without retyping.

Acrobat now allows "File, Save As, Microsoft Word." It allows easier copying of content but does not preserve formatting.

In the past, the only option has been to use the "select text" tool in Acrobat to copy sections of text one at a time (with the downside of having to delete hard-coded line breaks). Now with Adobe Acrobat 6.0 or 7.0, it is possible to simply "Save As" Microsoft Word format. This will convert the document as close as possible. It will NOT preserve the formatting seen in the original PDF, but it will make it easier to copy and paste blocks of text.

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.