

The Association for Proposal Management Professionals - Houston



**Final
Draft**

Making Sense of Word's Features Halliburton PM to Lead Live Demonstration April 2

Save the Dates and Follow the Links ...

- [APMP Houston Chapter Meeting](#), Wed., April 2, 3010 Briarpark Drive
- APMP Houston Board of Directors Meeting, Wed., May 7, 3010 Briarpark Drive
- [19th Annual APMP International Conference and Exhibits](#), Tue.-Fri., May 27-30, 2008, Rancho Mirage, Calif.
- APMP Houston Chapter Meeting, Wed., June 4, 3010 Briarpark Drive

David Wallis, a senior proposal manager for Houston-based Halliburton, will lead a live demonstration of helpful Microsoft Word functions at the next meeting of the Greater Houston Chapter of APMP on Wednesday, April 2.

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.

Mr. Wallis' topic, *Microsoft Word Tips and Tricks - Using Styles and Other Advanced Features in Proposal Development*, will demonstrate some of Word's most useful features related to proposal devel-



David Wallis, a senior proposal manager for [Halliburton](#), will speak at the April 2 chapter meeting.

oping table of contents, working with graphics, PDF files, and more.

Although he has formal Microsoft Word training, Mr. Wallis said most of what he has learned over the years is "self-taught" through "trial and error," research, and observation. While he believes proposal professionals are among the most knowledgeable Microsoft Word users, Mr. Wallis said there is still room for improvement, especially for proposal managers.

"I think that's unfortunate because even though proposal management involves far more than formatting documents, Word skills are funda-

ment. Topics will include automated formatting with styles, auto-

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10 Reasons to Attend APMP's 19th Annual Conference

1. As a proposal professional, it is a good investment for you, your company, and your career.
2. You will return refreshed and excited about being a proposal professional.
3. You will learn more about every aspect of managing, writing, and winning a proposal than you can think of.
4. You will bring back information and techniques you will be able to implement immediately.
5. You will have fun!
6. You will find out that you know more about this proposal stuff than you realized.
7. You will have the opportunity to trade tips and ideas with your peers.
8. You will have documentation to back you up the next time you want to do it your way.
9. You will not have to keep inventing the wheel.
10. You deserve it!

From the Prez: New Chapters, Annual Conference

Spring is proving to be an exciting time for APMP, including here in Texas.

Last issue we had a wonderful article about a new APMP chapter, Central Texas. Now there is even more fun for APMP members in Texas. Linda Gregg and her interim board successfully submitted their reinstatement charter for the Lone Star Chapter in the Dallas/Fort Worth area. [More information on their plans](#)

is included in this issue.

[The 19th Annual APMP International Conference](#), “Global Positioning Strategies for Capture and Proposal Professionals,” will be held in Rancho Mirage, Calif., from May 27 to May 30. There will be several members from the Houston chapter attending and a few who will be presenting at the conference. On Thursday, May 29, at 5:30 pm, there will be an informational

Houston chapter meeting for those at the conference. Please check your schedule when you arrive at the conference for the location.

I’m looking forward to attending the conference once again. I was a member of APMP for five years before attending my first conference in 2006. I learned so much from that event that I promised myself to never miss another conference again. I find

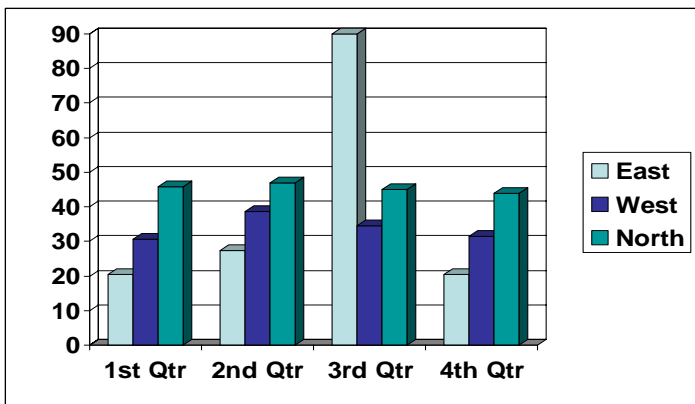
it that valuable. I hope you will plan to attend.

Regards,

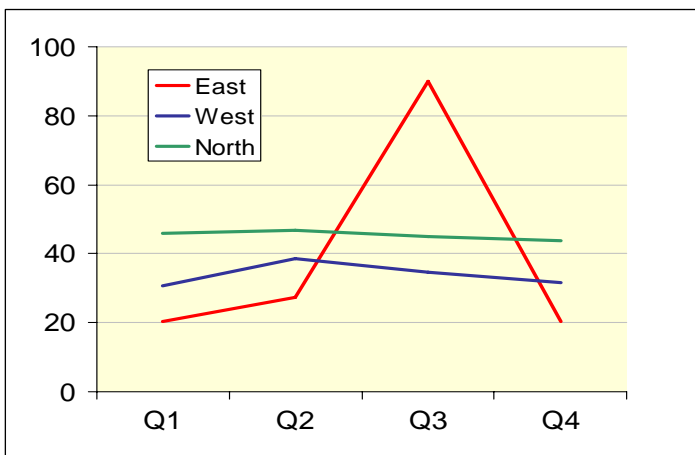


Jeannette Waldie, AM.APMP
President,
Greater Houston APMP Chapter
and Central U.S. Regional

Follow These Steps to Improve Your PowerPoint Charts



This sample chart looks like it came “straight from PowerPoint.”



This sample chart offers an alternative to the default chart.

By David Wallis

If you open PowerPoint and select “Insert,” then “Chart,” the default graph at left is what you’ll get.

While this is a workable graph, it has that “straight from PowerPoint” look to it. Below left is a possible revision of the same chart. There are many ways to improve basic PowerPoint charts but here are a few simple suggestions:

Move the legend inside the graph. Note the difference in these same two examples. If there is plenty of blank space inside the graph, why leave the legend off to the side?

Lighten your gridlines. Black gridlines in the background tend to compete with data. Notice how in the second example, they have been made a shade gray. They still serve their purpose but don’t get in the way as much.

Experiment with the chart type. There’s no “right” chart for every situation, but don’t be afraid to try other options. Here the columns work fine, but a line graph tends to illustrate the trend in the data a little better.

Avoid clutter. For charts, the less ink on the page the better. The text on each axis here is originally rather bold and busy. In the “after” example, every other number has been removed, “1st Qtr” has been shortened to Q1, and the bold has been turned off. Also note here that the top and right borders on the graph have been removed (fewer lines are better).

Change default colors. PowerPoint’s default color palette is not exactly exciting. Don’t be afraid to change colors, especially when you need to create more contrast as done here. The

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19th Annual APMP® International Conference and Exhibits

G P S Global Positioning Strategies for Capture and Proposal Professionals

Details

Date
May 27 - 30, 2008

Location
Westin Mission Hills Resort & Spa
Rancho Mirage, CA

More Info.
For schedule, presenters and venue information,
please visit www.apmp.org



Program

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For More Information,
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[www.apmp.org/
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HURRY!
Early Bird Rates Effective Through March 31!

Single Fees Increase 10% on April 1

Effective Visual Communication Leads to Wins

Editor's note: The following article was written by Mike Parkinson of [24 Hour Company](#). One of Mr. Parkinson's colleagues at 24 Hour Company is Colleen Jolly, who spoke at the Greater Houston Chapter of APMP's February membership meeting.

By Mike Parkinson

How do I get my technical staff to value and effectively use graphics?

Professionals who lack technical know-how, resources, or experience using graphics are reticent to use visuals and, as a result, tend to devalue visual communication. There are two approaches I take to win over those who push back against graphics:

First Approach

I share empirical evidence supporting the value of clear visual communication. The following are useful facts based on research from the attributed institutions:

- We process visuals 60,000 times faster than text – 3M Corporation
- Forty percent less time is needed to explain complex ideas when using graphics – Wharton School
- Using visuals improves learning as much as 200 percent – University of Wisconsin
- Graphics improve retention by 38 percent – Harvard University
- Presenters who use visual aids are 43 percent more effective in persuading audience members to take a desired course of action – University of Minnesota School of Management

I usually share graphic samples that support these statistics. For example, is it quicker to describe a circle as a curved line with every point equal distance from the center or to show a circle? Is it easier to describe how an organization is structured or show an organ-



According to Mike Parkinson of 24 Hour Company, "Because information is often lost in translation between the technical staff and the designer, it is in the best interest of the team and the company to teach the subject matter experts how to effectively conceptualize their graphics."

izational chart? You can also use real-world examples from successful past proposals (or from the Internet) that illustrate the power of good visual communication. However, I do point out that graphic communication is not *better* than text. Instead, the combination of graphics and words has a communicative power that neither singularly possesses. The subject matter expert is not wrong to use text; however, they are better served to use both. If they do, the likelihood that the audience will better understand and value their insight increases exponentially because the audience can quickly refer to and digest the subject matter expert's information.

I have related war stories and client testimonials that underscore the value of using graphics in proposals. For example, Greg Giddons, Executive Director of the U.S. Customs and Border Protection Secure Border Initiative (SBInet) Program Management Office (and

part of the SBInet decision-making team) said that visuals help tell the story. In addition, he said that graphics give evaluators a break because after reading several proposals "200 pages of text begin to look like ants." In fact, Greg saves his favorite graphics and keeps them with him for reference – a testament to the fact that evaluators love graphics.

Second Approach

I share a repeatable three-step process with the technical staff that empowers them to convert their words and ideas into clear, communicative, compelling graphics. For many proposals, it is not the technical team's responsibility to render the graphics but rather to conceptualize the visual representation that helps the audience understand, remember, and be influenced by the presented material. Because information is often lost in translation between the technical staff and the designer, it is in the best interest of the team and the company to teach the subject matter experts how to effectively conceptualize their graphics. Most designers focus more on the rendering itself than the information communicated and sometimes have little information about the audience or the subject matter being depicted (which are key to generating a successful graphic). Armed with the know-how to conceptualize winning proposal graphics and the understanding that they will focus more on the correct depiction and not how to do the final rendering, the technical staff's apprehension dissolves. Plus, they can better communicate their ideas to the designer, who will generate a final graphic that more clearly depicts the technical staff's ideas.

The three-step process is as follows:

- **Know your P.A.Q.S.** Primary objective, Audience, Questions that need to be answered to achieve the primary objective, and the Subject matter

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Effective Visual Communication Leads to Wins

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- **Use a combination of four methods to convert your ideas into graphics.** Literal Method, Substitution Method, Quantitative Method, and Assembly Method
- **Render or direct the rendering of the final graphic.** There are a few simple rules to follow that ensure that the final graphic is successful. (To learn more about this three-step process, visit www.BillionDollarGraphics.com)

Once the process is explained, the means to convert text and ideas into persuasive visuals is easy and less daunting. The more they do it, the better they get. I found that, over time, the technical staff begins saying things like “let me show you” and drawing their solutions on a white board or piece of paper. (There is absolutely no need for the conceptualizer to

be Michelangelo. Stick figures and crude representations – with a quick explanation – are perfectly acceptable when communicating their concepts.)

How do I get my technical staff to communicate to the proposal staff what they would like to see in a graphic?

I use P.A.Q.S. (see previous answer) to “interview” the subject matter experts, if they are unfamiliar with the process. Assuming they know more about the customer than I (if not, I get the answers to audience-specific questions from those who are most knowledgeable about the customer), I ask variations of the following questions:

- What is the primary objective of this graphic?
- Who is your target audience?

- What do you know about them?
- What is their goal?
- Are they technically proficient with the subject matter?
- What questions must be answered for the customer to achieve the primary objective? (What are the answers to your audience’s questions?)
- Why does the audience care about this?
- What is unique about it?
- What is the direct benefit to the audience for each of these discriminators?

The number, order, and flow of the questions are dependent on the type and complexity of information, the knowledge of the technical staff, the time available, and my needs. Asking these questions ensures that the subject matter experts are thinking about the graphic in a way that syncs their knowledge with the customer’s wants and needs – instead of an explanation of what they know.

Budgetary constraints make it important for our organization to get the most out of each graphic. What can I do to get a winning graphic at the lowest cost?

There are two strategies I highly recommend:

- Leverage your existing graphics by creating a searchable library. Typically, your company has an existing process, tool, and/or approach for handling each topic discussed in the proposal. Your company also has past proposals that are perfect for finding old graphics that work. The content and design of the graphics will need to be tailored for the current proposal but referencing or starting with a depiction that has worked in the past is a smart move. Most authors struggle with



Proposal Pictionary

Colleen Jolly of 24 Hour Company enjoys a light moment while leading a session on “Proposal Pictionary” during the Greater Houston Chapter of APMP’s February meeting. Meeting attendees were challenged to draw pictures of proposal-related “key” words or phrases while others tried to guess that word or phrase as it was being drawn.

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Dallas/Fort Worth Has APMP Renaissance

Lone Star Chapter's Rebirth Means Texas Now Has 3 Groups

By Michael Kent, AM.APMP

Final Draft Editor

Call it a renaissance. Call it a rebirth. Either way, the Dallas/Fort Worth area's Lone Star Chapter is now Texas' third APMP chapter, earning its charter shortly after the Central Texas Chapter was approved in January.

Rebirth? Indeed, a Lone Star Chapter once served the DFW area, only to see interest wane in the early 1990s. For more than 10 years, the Metroplex was without a chapter.

And Linda Gregg wouldn't stand for it any longer.

"Being in proposal management for 20 years, I knew there was a professional market for the services that APMP provides," said Ms. Gregg, who for more than a year has worked toward restarting the chapter. "I also knew there were a wide variety of proposal service organizations within the Dallas/Fort Worth Metroplex."

After expanding her own proposal skill set through a variety of university classes, Ms. Gregg decided it was time for the Lone Star chapter to be reinstated so that area members could be better positioned to "reap the benefits" of local and national APMP services such as training, accreditation, and professional placement for all the professionals living in the Dallas/Fort Worth area.

Ms. Gregg has had plenty of motivation to restart the chapter. In October 2005, she accepted a proposal manager position at [L-3 Communications Integrated Systems](#) (L-3/IS) in Greenville, about 50 miles northeast of Dallas.

"As a proposal manager I supervise both Proposal Coordinators and Managers for a wide variety of government and international proposals," she said. "With this responsibility I have to maintain a constant recruiting mind



The Lone Star Chapter has a logo.

frame for department service demands and department growth."

Ms. Gregg formally initiated the process last summer and organized the chapter's first reinstatement meeting in July 2007. In December 2007, the group held its second meeting, which included finalizing board elections. The response, as she described it, was "surprising."

"We had individuals as far north as Durant, Okla., contact our chapter," Ms. Gregg recalled. "Local members contacted me and continue to contact me demonstrating the need for a local chapter."

Additionally, Ms. Gregg said she has received considerable support from Jeannette Waldie, APMP's regional board representative and the Greater Houston Chapter's president.

"Her patience and guidance have been invaluable," Ms. Gregg said.

With members responding from as far north as Oklahoma and as far west as Weatherford (west of Fort Worth), the Lone Star Chapter covers a large area. To reach out to as many members as possible, Ms. Gregg said the Lone Star chapter will be holding its meetings at different locations in the Metroplex.

The next meeting is scheduled for Thursday, April 3, starting at 6 p.m. at the Saltgrass Steak House, [102 East State Highway 114 in Grapevine](#). Dennis Fitzgerald of [24 Hour Company](#) is the scheduled guest speaker.

Ms. Gregg heads up the Lone Star Chapter's board of directors as its chairwoman. Other board members are Melanie Baker of Fort Worth, co-chairwoman; Scott Cuppett of Greenville, treasurer; Esther Mooring of Plano, secretary; Leslie Harville of Fort Worth, programs chair; and Daryl Jones of Plano, membership chair. The board also hopes to appoint a publicity/promotions chair.

Now that the Lone Star Chapter is active once again, the challenge facing Ms. Gregg and her board will be to maintain the activity level. Judging from their ambitious agenda, the rejuvenated Lone Star Chapter is doing everything it can to prevent what happened previously.

Besides its April meeting, the Lone Star Chapter already has lined up speakers for three other chapter meetings this year and is trying to identify a guest speaker for a fourth meeting. Additionally, the chapter has lined up APMP accreditation expert Holly Andrews to speak at a special meeting. Counting its recent February meeting, that's seven meetings planned in 2008.

But the Lone Star Chapter is not stopping there. Plans are under way for many more activities.

"Daryl Jones, our membership chair, is also the local Shipley representative for the southwest division, and he is currently researching training that we can provide based on Shipley processes," Ms. Gregg said. "I also contacted local university professors from two different business schools who have agreed to present

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Effective Visual Communication Leads to Wins

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thinking graphically. Attempting to develop the solution with no more than a blank sheet of paper or screen is unnecessarily challenging and time consuming. Instead, start with an existing image of a solution that was successful in the past. Doing so will save hours and reduce stress, and the solution will be more thoughtful (benefiting from the evolution of the ideas/image as it is passed from one proposal to the next). Picasso once said, "good artists copy but great artists steal." In other words, be smart and use what others before you have learned.

- Evolve your concept before rendering the final graphic. Proposals require long days with light resources. If there is little time or money to evolve the graphic, the author should ensure that the idea is as far along as possible by reviewing the concept with the other subject matter experts/authors or the Volume Lead to verify that it answers the addressed question before assigning it to the designer. In turn, the designer should learn all that he or she can about the concept before creating the final rendering. The designer should sketch the solution first and present it to the author for approval. To

ensure agreement on the graphic, the author should then get approval from the other subject matter experts/authors/Volume Lead. If they agree, the graphic can be rendered. If not, tweak the graphic on paper until everyone agrees. If they have edits, the sketch is tweaked until the visual representation of the solution is approved. The graphic is now ready to be rendered on the computer. The iterative process of proposal graphic development is necessary but costly and time consuming. By evolving the concept using simple sketches, you will not only save significant time and money but you will also find that the team's brainstorming sessions will be more organic and productive since the process is real-time (or close to it).

There are four more strategies that have worked for other organizations:

- Make your designers part of your team. Invite the designer to team meetings to help them understand the content and objectives of the proposal. This will help them render clear, communicative, compelling graphics that speak to the customer.
- Storyboard. Get everyone on the same page as early as possible before you

begin laying out pages or slides.

- Use a template. Design a graphic template in the early stages of the proposal before layout and design begins. Doing so ensures that your proposal is consistent, which builds trust, and eliminates the need for a lengthy (and costly) formatting pass.
- Make the graphics customer focused. Many proposal graphics are deleted because they did not focus on what the customer wants and needs.

For more information, obtain a copy of the article "[Getting Proposal Graphics Right the First Time](#)" in the Fall/Winter 2006 edition of the Journal of the Association of Proposal Management Professionals.

Mike Parkinson is a principal at 24 Hour Company, a Washington, D.C., area consulting firm specializing in proposal graphics and desktop publishing. He speaks frequently at APMP chapter meetings and conferences, and is a regular contributor of visual communication articles for magazines, newsletters, and a variety of professional Web sites. He wrote the book [Do-It-Yourself Billion Dollar Business Graphics: 3 Fast and Easy Steps to Turn Your Text and Ideas Into Graphics That Sell](#). His formal design training includes the Baltimore School for the Arts and the University of Maryland-Baltimore County's Digital Arts Program.

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>

APMP Having a Renaissance in DFW

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proposal topics and training for meeting requirements. Training and networking are both major interests for all members."

In the short term, Ms. Gregg said the Lone Star Chapter is working toward publishing an upcoming newsletter, launching a Web site, and encouraging a big local chapter turnout at the upcoming APMP National Conference, where she also hopes to host a social for the

Lone Star chapter. Over the long term, Ms. Gregg hopes to grow chapter membership to at least 100 and average at least 35 members attending each chapter meeting. Virtual meetings are also being considered down the road.

All of this is part of a larger vision.

Ms. Gregg explains, "We want this to be a local organization that is recognized in the Dallas/Fort Worth market by both professionals and corporations as *the source* for proposal services, training and knowledge base."



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.

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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.

Some Helpful Tips to Improve Those PowerPoint Charts

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light colors can be very effective such as the light yellow background shown here.

Don't forget a caption! Chart captions are not just labels, they are one of the most read items you will ever write and should always tell people what they should see in the chart.

David Wallis is a senior proposal manager for [Halliburton's](#) Global Business and Technical Solutions team. He has 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.

Live Demonstration to Focus on Microsoft Word Functions

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mental to both presenting information professionally and to maintaining a good timeline," he said.

Understanding Microsoft Word better, Mr. Wallis added, has become necessary in the proposal profession because of the application's universal acceptance.

"In our business, Microsoft Word is the only software we can or would use for proposals," he said. "It may not be the best software on the market, but it's more powerful than most people think, and it can import almost anything, so it's easy to handle items that need to

be inserted from other software."

Mr. Wallis is a senior proposal manager for [Halliburton's](#) Global Business and Technical Solutions team in Houston. This team provides global tender support for many of Halliburton's largest oilfield services projects, with a current pursuit portfolio of more than \$12 billion.

Mr. Wallis has been involved with proposals for most of his 13 years with Halliburton. He also authored Halliburton's official proposal process and conducts periodic global seminars internally to train other groups on proposal procedures and tools.