

The Association for Proposal Management Professionals - Houston



Final Draft

Why Our Behavior Is 'Not Personal' June 4 Speaker to Discuss Workplace Communication

Save the Dates and Follow the Links ...

- [APMP Houston Chapter Meeting](#), Wed., June 4, 3010 Briarpark Drive
- [19th Annual APMP International Conference and Exhibits](#), Tue.-Fri., May 27-30, 2008, Rancho Mirage, Calif.
- APMP Houston Board of Directors Meeting, Wed., July 9, 3010 Briarpark Drive
- APMP Houston Chapter Meeting, Wed., Aug. 6, 3010 Briarpark Drive

Dr. Robert Pennington, an educational psychologist and award-winning speaker, will talk about communication and human behavior in the workplace at the next meeting of the Greater Houston Chapter of APMP on Wednesday, June 4.

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.

Dr. Pennington's presentation, *It's Not Personal! Understanding Why People Behave the Way They Do*, will use concepts drawn from the Myers-Briggs Type Indicator (MBTI), The Cycle of Conflict[®],



Dr. Robert Pennington, an educational psychologist and corporate training consultant, will speak at the June 4 chapter meeting.

The Levels of Being[®] and The Emotional Computer[®] along with the presenter's 35-year study of

human behavior. With humor and practical, down-to-earth examples, participants experience the inescapable realization that the behavior of others is never personal – even when they mean it to be.

Through Dr. Pennington's hour-long presentation, meeting participants will be able to:

- Understand the power of unconscious beliefs in affecting how everyone communicates and how others get on your nerves.
- Realize emotion as a method for communicating beliefs.
- Understand that if a person is going to behave the way they do, whether you are there or

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Meet Up with Fellow Texans at 19th Annual Conference

With the 19th Annual APMP Annual Conference coming up, Texas-based members who plan to attend the yearly event will have an opportunity to congregate and network as a group.

Members of the [Lone Star](#) (Dallas/Fort Worth area), [Central Texas](#) (Austin/San Antonio area), and

[Greater Houston](#) chapters are cordially invited to sit together during the afternoon lunch on Wednesday, May 28, according to [Jeannette Waldie](#), Central U.S. Regional APMP Representative and Greater Houston APMP Chapter President.

The Wednesday lunch begins at

12:30 p.m. at the Westin Mission Hills Resort and Spa, site of this year's APMP Annual Conference. Lunch is included as part of the conference registration fees.

Texas APMP members should look for the table banners on the veranda that read "Texas All-Stars."

From the Prez: Houston Board Elections Coming Up

Just as spring is turning into summer, it is time for the Greater Houston Chapter to select new Chapter Board officers.

Last year, we revised the by-laws to provide staggered terms for positions. The Board positions that are up for election this summer are:

- President
- Program Chair
- Treasurer
- Communications Chair

Our current Program Chair, **Tanya Willis**, and our Commu-

nications Chair, **Michael Kent**, are both thinking of stepping down. So if you would like to meet regularly with a great bunch of folks and help make the Houston Chapter one of APMP's top chapters, then send your bio to mjk77@yahoo.com to be published in our next newsletter. Elections will be held at the Aug. 6 meeting.

The Chapter has applied to be considered for two APMP chapter awards, which will be presented at the 2008 APMP Annual Conference in Rancho Mirage, Calif. The award categories

include Chapter Membership, Chapter Programs, Chapter Special Events, and Chapter Communications. The chapter has submitted applications in the Communications and Chapter Programs categories.

APMP can also award the Stephen P. Shipley Award for the APMP Chapter of the Year, and the Steven S. Myers Award for the APMP Chapter Chair of the Year. Full APMP award details can be found on the [APMP Web site](#). Wish us luck!

Don't forget! If you are attend-

ing the conference, join me on Wednesday at the "Texas All-Star" tables for lunch. Look for the table banners on the veranda.

See you soon!

Regards,



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

How to Manage Those MS Word Section Breaks

By David Wallis

Section breaks in Microsoft Word can be set up to do great things, but in proposal production, they tend to just complicate life and wreak havoc on documents. My advice is to avoid them if at all possible.

Actually, you really only need section breaks if you want to change margins, page orientation, or headers/footers. All three of those tasks have workarounds: keep only one margin but manually override it as needed; keep headers/footers consistent or insert field codes if the header needs to repeat the current chapter name; and don't change page orientation, just rotate content

when needed (who really cares if you have landscape content with portrait headers/footers). If you can live with these compromises, you'll spend a lot less time formatting.

Occasionally you will paste in content that contains many sections breaks. Often, the first thing you notice is that your headers, footers, and margins are suddenly all screwed up. The solution is to get rid of section breaks, but finding and deleting each one manually can be time consuming.

Here's an easier way: Click on "Edit," "Replace," click on "More" in the dialog box.

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David Wallis, a senior proposal manager at [Halliburton](#), leads a live discussion on Microsoft Word functionality. Mr. Wallis delivered his presentation at the April 2 meeting of the Greater Houston Chapter of APMP.

Nothing's 'Old' About This Conference Duo

By Michael Kent, AM-APMP

Final Draft Editor

If you plan to attend the 19th Annual APMP Conference May 28-30 in Rancho Mirage, Calif., be on the lookout for “an old married couple” who will be trying to teach conference-goers a thing or two about “speed dating.”

No, the APMP Conference has not become a geriatric singles seminar. In this case, “speed dating” serves as a metaphoric reference to the Conference’s opening presentation topic. And “an old married couple” refers to the self-deprecating humor employed by one-half of the wildly popular Conference duo – two men living on opposite sides of the Atlantic Ocean – who will be delivering that opening presentation.

That duo would be Jon Williams and B.J. Lownie, both managing partners of [Strategic Proposals, LLC](#), a global proposal consulting firm. If you were at last year’s APMP Conference in Savannah, Ga., or if you have been in the APMP circles for a while, Mr. Williams’ and Mr. Lownie’s names ought to be readily recognizable. But if you are relatively new to APMP, this tag-team of proposal subject-matter experts has been a regular part of the APMP Conference cast for some time now.

For example, at last year’s Conference, the two delivered the topic “The Church of Proposal Excellence,” which Mr. Williams described as “homage to the importance of effective proposals.” At this year’s opening session on Wednesday, May 28, Mr. Williams and Mr. Lownie will present “GPS – Getting People in Sync.” The hour-long keynote will focus on how teambuilding and the need for connecting and communicating with each other can be helpful in getting proposal team members to perform at high level.

During this time, Mr. Williams and Mr. Lownie will use an entertaining, often humor-



Jon Williams

ous, approach to help Conference attendees to connect with one another and hopefully get more from the three days’ worth of workshops and activities. “Think ‘speed dating’ for proposal people,” according to [advance APMP publicity](#) for this presentation. (As for the “old married couple” reference, Mr. Lownie makes the tongue-in-cheek comparison on their [proposal blog](#). More on the blog later.)

So what makes these guys’ APMP Conference presentations so well received? A lot of it has to do with how well Mr. Williams and Mr. Lownie work together, and that goes back to 1998, when the two first met. At the time, Mr. Lownie was serving as the proposal leader of a proposal effort while Mr. Williams worked for the client as the head of purchasing.

“I think we each recognized ‘kindred spirits’ in the other from the outset,” Mr. Williams said. “(We are) people who love to do things creatively, who strive for first-class results, who enjoy stimulating others to do great stuff.”



B.J. Lownie

Mr. Lownie added, “Jon and I immediately recognized that we shared a strange, twisted sense of humor and that we both viewed our respective team members with a bit of suspicion – for not sharing our sense of humor – and we naturally migrated toward each other.”

From that point, it was a matter of “logical progression,” according to Mr. Williams, who at the time was attempting to establish a strategic bid center for a major information technology company. While he considered himself highly knowledgeable on the topic of proposal evaluation and “what good looks like” in proposal terms, Mr. Williams said he wanted the best possible consultant to help develop processes, “and B.J. was the obvious choice.”

“Since then we’ve had nearly 10 years of melding our different experiences,” Mr. Williams said, “and having fun doing so.”

Mr. Williams and Mr. Lownie, both recipients of the prestigious APMP Fellow Award that

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Nothing's 'Old' About This Conference Duo

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recognizes individuals who have made significant contributions to the new business acquisition profession, have two very different professional beginnings. Mr. Williams has a background in procurement (and is a former national debate champion) while Mr. Lownie has experience in journalism, engineering, and business (and once participated in a drama troupe).

While the two say they agree most of the time, it is during the times of disagreement when “the magic happens,” according to Mr. Williams. “Our different perspectives, aligned to our shared experiences, help us to unlock some really cool and original stuff.”

The process usually begins with a simple idea coming to mind.

“Jon comes up with a bunch of ideas. I then explain the concept of ‘humor’ to him,” Mr. Lownie said. “Then we develop new ideas. OK, the truth is it usually starts with something very small. I think ‘The Church of Proposal Excellence’ started when I mentioned I had become a reverend, via the magic of the Internet.”

Usually, the two will start their presentation work about a year in advance. (“It’s not uncommon for us to finish one conference by brainstorming topics for the next,” according to Mr. Williams.) This is followed by “dozens” of e-mail exchanges since Mr. Williams is based on the United Kingdom while Mr. Lownie is located in the United States.

“We’ll then pull the ideas into a document, and spend weeks staring into the distance on our opposite sides of the Atlantic, waiting for the final inspiration to strike,” Mr. Williams said. “And then we start writing, and find ourselves polishing lines right up to the very last moment.”

How typical, given this profession’s nature.



Jon Williams and B.J. Lownie enjoy a light moment at last year’s APMP Conference trade show.

“Hey, we’re proposal guys,” Mr. Williams said. “We’ll keep going right up to whatever deadline we’re given!”

And once the duo finally gets the opportunity to meet face-to-face, they go take a walk, usually near water, to talk through their ideas.

“The movement, getting some space, fresh air, etc., really helps,” Mr. Lownie said. “We’ve walked along the Thames in London, the Charles in Boston, the Intercoastal in Miami, a small pond in Sydney, and even around a pool in Bangalore, India.

“Of course it’s not all glamorous. I recall doing several laps around the Sheraton at Heathrow one year. But even that did the trick. We did about five laps, hadn’t found the ‘magic,’ agreed to do one more, and found it.”

When they are not brainstorming on presentation ideas or actual proposal consulting jobs, Mr. Williams and Mr. Lownie extend their “passion for proposals” to their [proposal blog](#), which comprises a series of personal observations – sometimes related to proposals, and sometimes not. They agreed to start their blog a couple of years ago while sitting in the back seat of a taxi cab in Australia.

“Both Jon and I are writers by nature, as anyone who receives e-mails from us will attest, so posting our thoughts and sharing them with our fellow proposal professionals is a logical extension,” Mr. Lownie said. “We love the comments and feedback we receive.”

The blog, called “The Proposals Guys,” is

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New Texas Chapters Prompt Need to Update Membership Affiliation Through Online Method

By Jeannette Waldie, AM.APMP
 APMP Central Chapter Representative
 APMP Greater Houston Chapter President

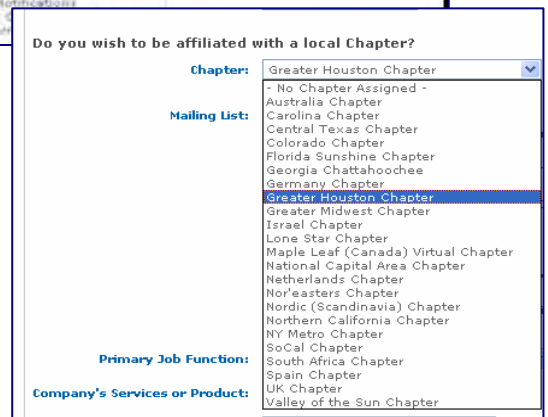
For several years, Houston was the lone APMP chapter in Texas. I am so excited that there are now the Central Texas Chapter in Austin and the Lone Star Chapter in Dallas/Fort Worth.

However, it has created a bit of an administrative problem and we need your help to fix it!

For each Texas Chapter to coordinate better with the national organization and to save you from receiving e-mails from all three chapters, we would like you to update your membership information with your chapter designation. Here is how you to it:

1. Go to www.apmp.org.
2. On the left side of the screen, you will see the membership login screen (as shown in the first diagram at the top right).
3. Type in your e-mail address as your login. If you do not remember your password, select "Forgot Password?" and an e-mail with your password will be sent to you immediately.
4. On the Member Home Page, you will see on the left "View Account Details" (see second diagram to the right). Click on that box.
5. Your membership profile will appear in the middle of a screen in a white box (see third diagram to the right). If you read down the list, you will see a field labeled "Chapter." Make sure it does not say "No Chapter Assigned." If it does OR if you want to change your designation to either Central Texas Chapter or the Lone Star Chapter, then you will need to proceed to the next

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Local Members to Present at Conference

Greater Houston Chapter members **Jeannette Waldie** and **Tim Budzik** will be among the many featured presenters at the 19th Annual APMP Conference in Rancho Mirage, Calif.

On Thursday, May 29, Ms. Waldie, senior marketing coordinator for [TCB](#) in Houston and current Greater Houston Chapter President, will lead a hands-on presentation on managing proposal resumes. Real-world examples will be shown throughout the presentation. This session is geared toward benefiting any professional who write resumes, whether as part of a large proposal center or as a "Proposal Lone Ranger."

On Friday, May 30, Mr. Budzik, a senior capture manager at Houston-based [United Space Alliance](#), will take part in a panel discussion on the influence of the proposal capture manager role. Other participants will include Eric Gregory of [CACI](#) and Allen Netzer of [Shipley](#). There will be discussion and a question-and-answer session on the relevance and influence of the capture manager in three phases of a business development opportunity.

These phases are: influencing the Request for Proposal (RFP), influencing the capture team, and influencing the response. The discussion will be led by a

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You Can Still Register!

19th Annual APMP[®] International Conference and Exhibits

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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



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For More Information, Go To: www.apmp.org/ca-29.aspx

Nothing's 'Old' About This Conference Duo

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their opportunity to provide proposal professionals “with some fresh perspectives, some new anecdotes, and some original ideas that might inspire them to do ever-better things,” according to Mr. Williams.

Within the past year, “The Proposal Guys” blog has introduced a discussion forum among proposal experts from around the world. This begins with a topic that Mr. Williams and Mr. Lownie kicks off, followed by the panel of experts weighing in.

Additionally, “The Proposal Guys” has included interviews of fellow proposal professionals who share information about their background and experiences.

“Both initiatives, I think, add extra color to the blog,” Mr. Williams said.

Although “The Proposal Guys” blog has grown in popularity over time (a hugely popular [“Best of the Blog” book](#) was distributed at last year’s APMP Conference), Mr. Williams and Mr. Lownie are best known for their engaging APMP Conference presentations. Whether a first-time attendee or someone who



B.J. Lownie and Jon Williams, also known as “The Proposal Guys.”

returns every year, APMP members who sit in on a Jon Williams/B.J. Lownie presentation do not leave disappointed.

Mr. Williams recalled one encounter last year with a group of fellow Conference attendees during a ride in an elevator. A lively discussion began on which was the best of all the Williams/Lownie Conference presentations they had heard over the years.

“There was one delegate who’d not heard us before, who was generous enough to come up to us after ‘The Church of Proposal Excellence’ and tell me that she now knew why people had been so enthusiastic,” he said.

Mr. Lownie added, “I’ve had people who haven’t seen us present say they’ve been told to make sure they didn’t miss our session. And I’ve had people who have seen us present tell us it’s their favorite session every year. We are, of course, incredibly flattered. This also drives us to be ever more creative.”

As Mr. Williams and Mr. Lownie both agree, it’s their mutual “passion for proposals” that keeps APMP members coming back for more.

“We just hope that we can entertain – while, importantly, conveying some of our passion for proposals, and embedding practical advice into the sessions as well,” Mr. Williams said. “After all, our business and our credibility are based not on talking about proposals, but on working on them and helping proposal teams to sharpen their act.”

Mr. Lownie concluded: “I shared a quote I came across just the other day from Antoine de Saint Exupery that said, ‘If you would have a person build a boat, don’t take them into the forest to fell trees for the mast and deck; teach them to love the sea.’

“I think that’s what we try to do in our presentations – share our passion for proposals.”

Houston Chapter Members to Present at APMP Conference

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moderator and the panel through case studies and experience with participation from the audience.

The outcome will be tips and techniques that the business development professional can take home and apply.

Update Membership Affiliation Online

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step. If the field already has your chosen chapter, then you are done and you can exit.

6. To change your information, select “Edit Account Information” on the right side of the screen.

7. The next page will allow you to change any of your information. Take this moment to correct or update any other information that needs changing.

8. To change your chapter, click on the field

box for “Chapter” and a dropdown box will appear. Select the chapter of your choice.

9. When done, scroll down to the bottom of the screen and select “Save.” You will be returned to the Account Detail page. Once you have checked to make sure everything is accurate, you are done.

Congratulations! By providing this information in your profile, you will receive information on local activities for your preferred chapter.

Thank you.



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.***

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.

Effectively Manage Section Breaks in Microsoft Word

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Next, with the cursor in the "Find What" box, select the "Special" button and choose "Section Break." Then position the cursor in the "Replace With" box and select "Special" then "Paragraph Mark." Finally, choose "Replace All," and they will all be gone.

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.

June 4 Chapter Meeting Topic Focus on Human Behavior in the Workplace

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not, then it is not personal! Difficult, yes. "Everyone has clients, co-workers and family who become difficult from time to time," Dr. Pennington explains. "One thing that makes them more difficult for us to deal with is our own unconscious habit of: 1) feeling uncomfortable whenever anyone does something we don't like, 2) making negative judgments about their behavior (and their motives!), 3) taking it all too personally and 4) reacting unconsciously.

"Unfortunately, we can't control our initial, habitual negative reaction to anyone or anything. Fortunately, we can control our second response, usually leading to the possibility of more positive results."

Dr. Pennington is a four-time recipient of the Mental Health Association's Outstanding Speaker Award. He is highly regarded for his unique ability to present complex concepts in readily understood language.

Dr. Pennington is also a partner at [Resource International](#) (RI) is a Houston-based management consulting firm that specializes in assisting leaders and their direct reports to reduce the resistance to change and conflict. RI consultants help their clients identify sources of organizational and individual ineffectiveness and teach ways to address it successfully. The areas of RI's expertise include professional speaking, organizational needs assessments, experience-based multiday trainings, transformational teambuilding, executive coaching, and computer-based training.