

The Association for Proposal Management Professionals - Houston



Final Draft

Communicating Benefits Effectively

Feb. 4 Hands-On Presentation Focuses on Proposals

Save the Dates and Follow the Links ...

- [APMP Houston Chapter Meeting](#), Wed., Feb. 4, 2009, 3010 Briarpark Drive
- [APMP Central Texas Chapter Meeting](#), Thur., Feb. 5, 2009, Location TBA
- APMP Houston Board of Directors Meeting, Wed., March 4, 2009, 3010 Briarpark Drive
- APMP Houston Chapter Meeting, Wed., April 1, 2009, 3010 Briarpark Drive
- [20th Anniversary APMP Annual International Conference and Exhibits](#), Tue.-Fri., June 9-12, 2009, Chandler, Ariz.

Janice Scanlan, a Houston-area business consultant regarded for her work with professional service sales effectiveness, will lead a hands-on presentation at the next meeting of the Greater Houston Chapter of the Association for Proposal Management Professionals (APMP) on Wednesday, Feb. 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.

Ms. Scanlan's topic, "How to Keep Winning Simple in the Real World," will cover some of the issues that proposal professionals face when trying to communicate benefits to prospective clients.

"The problem is the experts who



Janice Scanlan will be the speaker at the Feb. 4 chapter meeting.

design your projects don't always understand customers," according to Ms. Scanlan. "Moreover, the people you need on your side are often so engaged in 'how to do the project' that focus can easily be lost away from 'what the client wants' much less the benefits of

your solution. Then, there are the elusive 'butterflies' who never have time, the subject-matter experts who regularly go off on tangents, and the rehashing of the hash, as well as the lack of appreciation for what is needed to win."

Ms. Scanlan's session will offer:

- Hands-on application of some techniques to keep crucial client benefits the essential part of the process
- Guidance on how to create value and believe you can and will perform simply and consistently
- Advice on how to incorporate benefits examples and compelling arguments conversationally and in proposals
- Discussion on how to help your organization better

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Houston Chapter Starts '09 With 2 New Board Members

For the Greater Houston Chapter of APMP in 2009, "new" describes more than just the calendar year. "New" also points to two people who now are seated on the

chapter's Board of Directors.

Say hello to Tim Budzik and Marlane Kayfes, the two newest board members. Mr. Budzik assumes the role of Program Chair while Ms.

Kayfes becomes the Communication Chair. Both begin two-year terms and replace outgoing board members Tanya Willis and

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From the Prez: '09 Board Brings a Blend of Old, New

Welcome to 2009! We are looking forward to providing even better quality programming and information for you this year.

I am honored to continue as the Chapter President for the next two years. I'm delighted that Fritz Rumscheidt has agreed to continue as our Treasurer for the next two years. Fritz is a wealth of information on all things APMP Houston, as he is one of our oldest members.

I would like to welcome Tim Budzik and Marlane Kayfes to the board. Tim was elected as our new Program Chair at the December meeting. Marlane has been appointed by the board as our new Communications Chair as that position was still open at the election.

I would like to thank Tanya Willis and Michael Kent for all the hard work they have put in for the past two years. Tanya has

done a fabulous job arranging the program of speakers and Michael has been instrumental in getting our newsletter up and running. The next time you see them at a meeting, take a moment to thank them for their efforts.

Did you know that anyone can attend our board meetings? They are open and we encourage you to attend. The more input we have from the Houston members

of APMP the better we can serve you.

See you soon!



Jeannette Waldie, APM.APMP
President, Greater Houston
APMP Chapter

Is Your Office Properly Equipped for Proposals?

By David Wallis

Too often offices are caught scrambling for proposal resources at the last minute. *Risking the compliant delivery of a tender worth millions of dollars because you don't have the right office equipment and supplies is not acceptable.*

So, below is a reminder of the essentials every proposal group should keep on hand:

- **A good, fast color printer!** Your printer should be capable of automatically printing duplex (both sides of the page). Sometimes IT forgets to enable this option in the driver even if the printer can do it. Your printer should also be able to print 11x17 or A3 size paper for covers and brochures. *The proposal group should have its own dedicated printer whenever possible.*

- **Extra ink/toner.** Stock up. Don't be caught running out during a critical tender effort!
- **High-quality paper.** Use good paper (not plain copy paper). If possible, buy it prepunched!!
- **High-quality binders.** Make sure you always maintain a LARGE inventory of good binders in various sizes. Try to consistently buy the same brand so your cover templates stay the same size.
- **Divider tabs.** It is possible to get tabs that can be printed directly using an office printer, but otherwise, keep a large inventory of numbered divider tabs! Colored separator sheets are also helpful.
- **Heavy-duty hole punch.** Buy the best one you can find and check it often for



A large inventory of high-quality binders is just one of many kinds of supplies that should be kept on hand in a proposal room. Divider tabs, blank CDs, and extra printer ink and toner are among the other items that should be on a proposal room supplies checklist.

proper alignment.

- **Blank CDs and printable CD labels.** You also can get a plastic tool to help align and apply the labels along with stick-on pockets to affix to the inside cover of binders.
- **Good paper cutter.** A quality paper cutter will help you trim out covers and brochures.
- **Page protectors.** Clear first page and cardstock back page. Keep lots of these on hand.
- **Mailing labels and envelopes/boxes.** Don't seal up

tenders with sloppy wrapping. Stock up on nice packing material.

- **Proposal room.** If possible, every group should have its own lockable room for supplies and tender layout/assembly.

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.

Shipley Method ... Proposals as Easy as Writing Letters to Santa

By Andrea Madison

Shipley Associates

Happy New Year! Well, did you get what you wanted from Santa?

At the last Houston APMP meeting on December 3, Mark Wigginton presented the *Shipley Four-Box*™ proposal section writing approach in the context of writing a letter to Santa. If you did it correctly, there was **not** a lump of coal in your stocking this year.

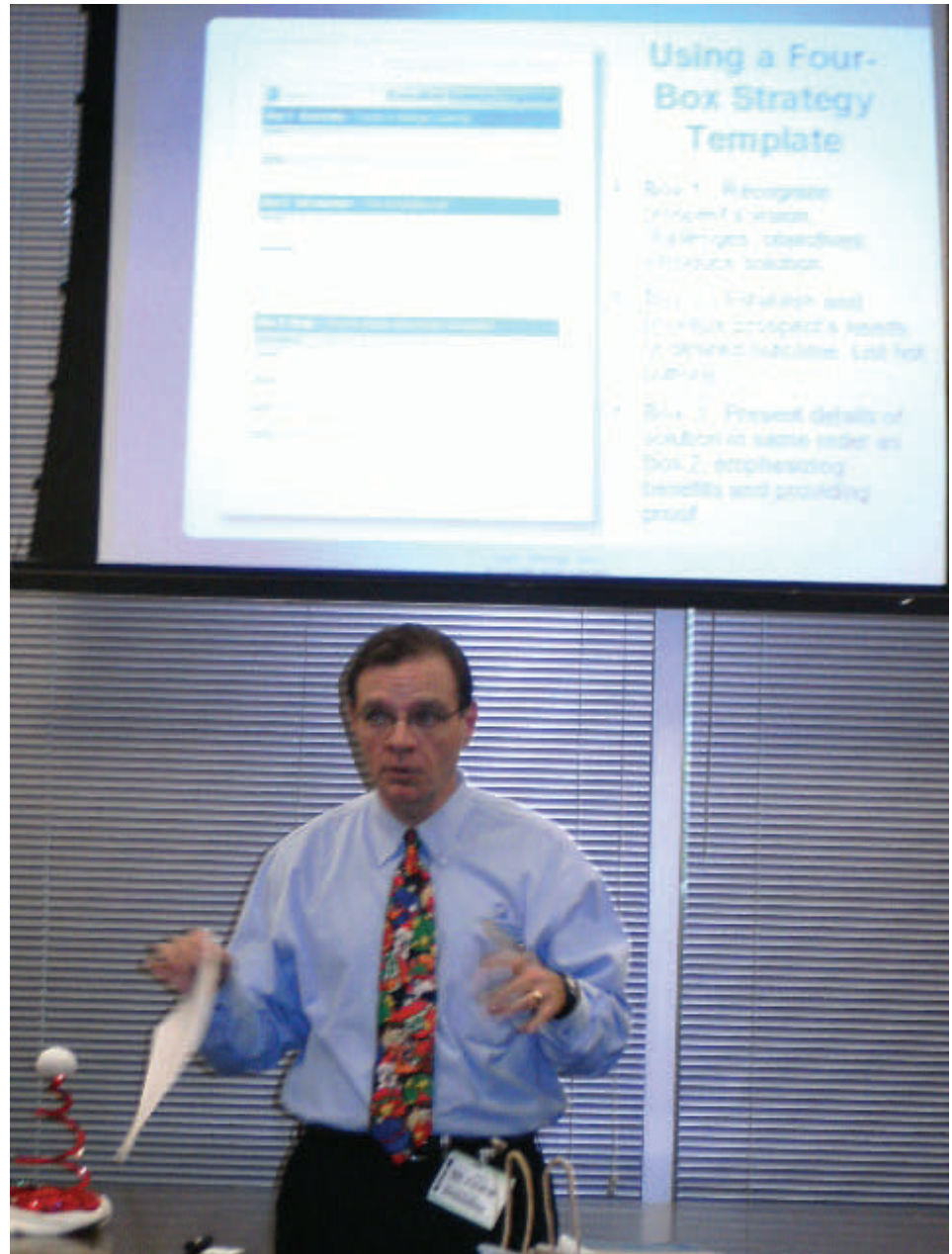
The important elements of the *Shipley Four-Box* method are the Summary, Introduction, Body, and Review.

Now, in the case of writing a letter to Santa, the first step is the Summary. In this section you must tell Santa your purpose in a very clear, straightforward heading. You should summarize the essence of your letter; state what you want Ole St. Nick to “do,” “know,” and “feel.”

Next, you should have included an introduction in your letter. The introduction is to provide the points that would most likely influence Santa.

Of course, the body is the most important part! You must provide convincing details for

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Mark Wigginton, a Regional Sales Director for [Shipley Associates](#), leads a discussion on the Shipley Four-Box approach to proposal section writing.

Automatically Show Chapter Headings in Word Header

By David Wallis

If you have a Word document where chapter headings are created using the “Heading 1” style, it is possible to have them automatically appear in the document header. Just go to the

header and choose “Insert,” “Field,” then select “StyleRef” and pick the Heading 1 style. The chapter title text will be displayed in the header automatically and change as the chapters change. The same process is used to add other items as fields such as the file name.

“Alt” to Override “Snap to Grid”

Can’t position something just right in PowerPoint because everything “snaps” to an invisible grid? Overriding it is easy. Just hold down “Alt” while moving your mouse, and it will ignore the grid.

Shiplely Method ... Proposals as Easy as Writing to Santa

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Santa; this would include how you have been good and worked hard all year. But, you must use the same organizational scheme introduced in the introduction, and consider visuals of a few goodies on your list.

Finally, in Box Four, review. Review the compelling reasons why Santa should deliver what you put on the list, instead of a big lump of coal!

This simple, but effective, tool helps create evaluator-friendly organization to proposal

sections or volumes. It can be used for letters, proposal sections, executive summaries, or even volumes.

I hope you had a happy holiday and are excited for 2009!



Four-Box Template

Box 1: Summary

- Theme
- Vision

Box 2: Introduction

(Introduce Hot Buttons)

Subordinate Topics

List Hot Button # 1

List Hot Button # 2

List Hot Button # 3

Box 3: Body

Topic: Hot Button # 1

Solution/Benefit ... Proof ... Visual

Topic: Hot Button # 2

Solution/Benefit ... Proof ... Visual

Topic: Hot Button # 3

Solution/Benefit ... Proof ... Visual

Box 4: Review

Summarize ... Preview Proposal ... Next Step

Box 1: Signal your purpose in a clear heading. Summarize the essence of your message. State what you want the reader to do, know, or feel.

Box 2: Preview organization of the document. Organize around the points most likely to influence the reader.

Box 3: Provide convincing details for the reader. Maintain the same organizational scheme introduced in Box 2. Consider visuals to help convey your message.

Box 4: Summarize the reasons the reader should do, know, or feel what you want. End by clearly stating the next realistically achievable step.

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Houston Chapter Starts '09 With 2 New Board Members

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Michael Kent, who both stepped down at the end of their terms.



**Tim
Budzik**

Mr. Budzik has more than 20 years of experience in capturing and managing large programs for industry and government ranging from multi-million-dollar programs to \$9 billion acquisitions. In his current role at [United Space Alliance](#) (USA), Mr. Budzik is responsible for developing new business markets.

USA is one of the world's leading space operations companies. Established in 1996, USA is equally owned by aerospace industry giants [Boeing](#) and [Lockheed Martin](#), and employs more than 10,500 people in Texas, Florida, Alabama, California, Washington, D.C., and Russia.

Before joining USA, Mr. Budzik was director of capture and proposal consulting for [Shipley Associates](#), where he was responsible for the client delivery, process delivery and new consultant training. Additionally, he has earned the [APMP-Foundation™](#) level accreditation.

Mr. Budzik, who also has delivered presentations at the local and national APMP levels, wants to uphold the chapter's reputation of its award-winning guest speaker program.

"Over the last few years, Houston APMP programs have been outstanding," he said. "The quality of the speakers and the relevance of their topics have been beneficial to the members. Tanya has done a great job pulling some gifted speaker to our chapter meetings, and I hope to continue this tradition of excellence."



**Marlane
Kayfes**

Ms. Kayfes has worked in the communications field for some 20 years. She currently is a technical writer, and she writes and edits proposals, reports, and marketing materials for [IRC Risk and Safety](#) in Houston. IRC consults with companies to protect life by shaping design and operation of hazardous facilities.

Her career in communications was launched as a newspaper reporter and photographer for three years before she entered the medical field as an editor and document designer. During about 15 years working with institutions in the Texas Medical Center, Ms. Kayfes collaborated on Web site redesigns, edited manuscripts, newsletters, brochures, and manuals, and designed and managed the production of a variety of print materials. She also served for three years as the Web Manager for the Houston Chapter of [American Medical Writers Association \(AMWA\)](#).

Even with her extensive publications experience, Ms. Kayfes believes her new role on the Houston APMP board will be a challenge, but it is one she welcomes.

"Michael Kent set the bar high with the newsletter," she said. "I want to work with the members and board to maintain the current quality and add at least pinch of fresh ideas."

Ms. Kayfes expects to meld her new association with APMP and her years of experience in written communications to bring a new perspective to *Final Draft*, and she encourages any member to contact her with articles or ideas.

According to [chapter bylaws](#), the Program Chair leads the Program Committee, which "shall be responsible for overseeing the ongoing programs of the Houston APMP and assisting the Board of Directors in developing new programs." In recent years, the Program Chair's primary responsibility has been to contact and secure presenters for the program portion of each membership meeting.

The Communications Chair leads the Communications Committee, which "shall prepare and provide all external and internal communications, including program announcements, press releases, chapter newsletters, and special projects."

Feb. 4 Meeting to Focus on Benefits

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understand its competitive position in client terms

- Tips on how proposal professionals can personally gain more respect and appreciation for their work

Ms. Scanlan is founder of [Performance Foundations](#), which helps organizations achieve win-

ning results in marketing, sales, and service. She has more than 30 years' experience working with professional service sales effectiveness as well as facilitating highly complex teams with tight deadlines. Known for using common sense and humor and being able to bring out the best in organizations and people, Ms. Scanlan helps professional services firms win more and better business.

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

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

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

<http://proposalcafe.com>

<http://www.acquisition.gov/>

Why Proposal Evaluators Just ♥ Those Graphics

Studies Show Visuals Aid in Retention

Editor's note: The following article is reprinted courtesy of the APMP National Capitol Area's (APMP-NCA) newsletter, "Executive Summary."

By Mike Parkinson

You are fractured. Your attention span is finite. Your time is limited, so you are forced to pick and choose what you focus on. You are pulled in several directions at once. You switch focus from home to work to kids to friends to acquaintances. One second you are concentrating on driving, the next you are looking for your ringing cell phone, and a minute later you are listening attentively to the breaking news on your radio. At work you are typing a report, then answering the phone, surfing the Internet, solving another problem, looking for your pen, chatting with a coworker, attending meetings, and thinking about how tired you are. Everywhere you go, you are presented with an increasing amount of stimuli – friends, family, coworkers, sales people, telemarketers, television advertisements, and shows, news, movies, magazines, billboards, radio spots, and Web sites all competing to get your attention. It is amazing that we accomplish anything at all!



Even though "Proposal A" may be noncompliant, it often will receive higher marks by evaluators than compliant "Proposal B" if it has significantly more visually appealing graphics.

Evaluators and your audience are no different. Just like you, they make quick decisions based upon what they see. Studies show that we often ignore formal decision-making models because of time constraints, incomplete information, the inability to calculate consequences, and other variables. Intuitive judgment is the process for most decisions.

For this reason, evaluators, your audience, and you should ♥ graphics.

Using visuals in your proposals:

- Improves learning 200 percent – University of Wisconsin
- Takes 40 percent less time to explain complex ideas – Wharton School
- Improves retention 38 percent – Harvard University

Graphics make it much easier for your audience to understand and remember your solution. Profes-

sional, visually appealing graphics increase your likelihood of success by 43 percent (3M-sponsored study at the University of Minnesota School of Management).

Joan Miller (name changed), a proposal manager, taught a proposal writing course for more than 10 years. The class began with students forming source selection teams to evaluate two proposals and choose a winner based on the established evaluation criteria.

"Proposal A" was attractive, well written, and contained a large number of professionally rendered, visually appealing graphics, but the proposal was not compliant with the evaluation criteria. "Proposal B" was not well written and used a smaller number of dense, difficult-to-read graphics, but it was compliant.

If the source selection teams had

taken the extra time needed to understand "Proposal B's" graphics, they would have realized that the graphics suitably showed the system to be built. Not surprisingly, Miller often found that "Proposal A" (the easy-to-read, graphically appealing proposal) received the highest grades. When asked, the students said that they had been so caught up in the presentation that they had failed to realize the proposal was not compliant.

This is no surprise since we make quick, lasting judgments based on what we see – true or not – because our brains take "shortcuts" to solve problems. If we were to weigh all possible variables before arriving at a conclusion, decision-making would take far too long. As an example, which company, "A" or "B," is the bigger company?

Our brains are wired to make

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“Knowledge is Power”



Annual International
Conference & Exhibits

20th Anniversary

June 9-12, 2009, Chandler, AZ

Early Bird Registration Fees Through Feb. 28
[CLICK HERE](#) for More Information!



2009 Board of Directors

President - Jeannette Waldie
Vice President - Monica Williamson
Secretary - Janet Dodd
Treasurer - Fritz Rumscheidt
Program Chair - Tim Budzik
Membership Chair - Kim Muckelroy
Communication Chair - Marlane Kayfes
Webmaster - Lisa Edwards Tinsley

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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.

Why Proposal Evaluators Just ♥ Those Graphics

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quick decisions. (This is often a benefit since studies prove that, when faced with too much information, we often focus on the wrong data and choose poorly.)

I am not advocating the use of quality visuals over content, but rather the power of persuasion when both work synergistically to better explain your message. Well-thought-out content, coupled with quality graphics, results in a clear, communicative, compelling proposal – a winning proposal.

Greg Giddons, executive director of the U.S. Customs and Border Protection [Secure Border](#)

“Our solution will facilitate global communication and connectivity. The network will allow information to be shared anywhere in the world with any military force. Ground troops in Africa will be connected with forces in South America or offices in Australia. Air, ground, and sea vehicles can share data with strategic facilities. The solution we propose will unite military resources in a way that has never occurred before.”

Excerpt from a marketing document



Combining effective text and graphics helps sell benefits to clients.

[Initiative](#) (SBInet) Program Management Office (and part of the SBInet decision-making team) said that visuals help tell the presenter’s 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 ♥ graphics.

Mike Parkinson is an internationally recognized visual communications expert, multi-published author, professional trainer, and public speaker, and in 2008 received the prestigious [APMP Fellow](#) award. He is a partner at [24 Hour Company](#) specializing in bid-winning proposal graphics. His [Billion Dollar Graphics Web site](#) and *Billion Dollar Business Graphics* book share best practices and helpful tools with proposal professionals. For more information, contact Mr. Parkinson at mike@24hrco.com.