



Final Draft

2009 Meetings

Houston Chapter

- **Chapter Meeting**
Wed., August 5, 11 AM–1 PM
Brown & Gay Engineers, Inc.
Lubbock Conference Room,
[10777 Westheimer Rd](#)
3rd Floor, Houston, Texas
Seating is limited; RSVP by
Monday, August 3, to Janet
Dodd: janet.dodd@kbr.com
- **Board Meeting**
Wed., Sept 2, 11 AM–1 PM
Brown & Gay Engineers, Inc.
Lubbock Conference Room,
- **Chapter Meeting**
Wed., October 7, 11 AM–1 PM

Central Texas Chapter

- **Chapter Meeting**, 6–8 PM
Thurs., August 6
URS Corporation
9400 Amberglen Blvd,
Austin
Amy McGeady, Michelle Petty
Topic: Working Effectively in
Virtual Environments

Lone Star Chapter

- **Board Meetings** 2 PM
Sept 23, Nov 18
- **Chapter Meeting** 6 PM
Wed., August 12
Mike Parkinson
Topic: This Ole Proposal:
A DIY Guide to Creating
Proposal Graphics

Wed., October 14
Brenda R. Sims, PhD
Proposal Career Paths

CHIC from Barcelona
11909 Preston Rd, # 1426,
Dallas

Greater Midwest Chapter

- **Chapter Conference**
Schaumburg, Illinois
Postponed

Significance of Capture Management

Despite the market that a company is in—be it engineering, defense, construction, process, or services—there is a role for a person who is given early responsibility for developing new business opportunities. However, many companies sometimes lower that person’s potential for winning new work by often overlooking the attributes the person needs to have to realize success and the roles this person plays during



Robert S. Morse, speaker for August 5 APMP Houston chapter meeting.

the acquisition process. Just as in proposal management, there is an overarching capture process that best delivers success. The developmental actions the capture manager takes often are the key factors toward winning new work and certainly are necessary precursors to successful proposal management.

At the August 5 meeting of the Greater Houston Chapter

Continued on page 6

New Houston Meeting Location

Starting August 5, after several years of calling the ABB building home, the Greater Houston Chapter of APMP has a new meeting location.

Just a hop west of Beltway 8 from our previous location, Brown & Gay Engineers, Inc., has graciously

offered its third-floor conference room to our group. This is a comfortable space with room for registration and lunch buffet.

The building, at 10777 Westheimer Road, has a fountain in front and a parking garage in back; do not park in reserved or num-

bered spaces. Inside the building, APMP signage will guide your path, or just take the elevators to the third floor and then turn left to the end of the hallway. ■



In This Issue ...

From the Prez.....	2
Getting Technical Staff to Value and Use Graphics Effectively	2
Just a Meeting Away...APMP Accreditation Program Containing Professional Development (CPD).....	3
Powering Up on Knowledge: 20 th Annual APMP International Conference	3

From the Prez: New Location; CEU Tips

I got to take a break from Houston's summer heat and attend the 20th Anniversary Annual APMP® International Conference in Chandler, Arizona. Once again the conference was chock full of valuable presentations, information on different exhibitors, and the chance to meet other proposal professionals from around the world. For more details, see the article on the conference.

Please note that, with our August 5th meeting, we have a new home. Thanks to Michelle

Florence of Brown & Gay, we now have access to a wonderful large conference room at 10777 Westheimer just west of Beltway 8.

Did you know that attending a Greater Houston Chapter event is a great way to obtain the CEUs necessary to maintain your accreditation? There are other great ways that also help the chapter. Give a presentation or volunteer to serve on the board or on our Program Committee, Membership Committee or our Communications Committee. It is a great way

to become more involved and work with some great folks.

Hope to see you soon! !



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

Getting Technical Staff to Value and Use Graphics Effectively

By Mike Parkinson

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 you can take to win over those who push back against graphics.

Cite 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
- 40% less time is needed to explain complex ideas when using graphics—Wharton School
- Using visuals improves learning as much as 200%—University of Wisconsin
- Graphics improve retention by 38%—Harvard University

- Presenters who use visual aids are 43% more effective in persuading audience members to take a desired course of action—University of Minnesota School of Management

Show 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 organizational 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, 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



Mike Parkinson

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.

Tell 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.

Give your technical staff a three-step process that will make it easy for 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

(Continued on page 4)

Just a Meeting Away...

APMP Accreditation Program Containing Professional Development (CPD)

By Jeannette K. Waldie, APM.APMP

Almost one third of APMP members now hold a form of accreditation. But did you know that you have to maintain professional competence through obtaining continuing education units (CEUs)? Did you know that you have to keep a record of CEUs you've earned?

The number of CEUs you need to earn every two years depends on your accreditation level. The two-year period begins on the date you pass that level.

Table 1. CEU Requirements

Accreditation Level	Number of CEUs Required Every Two Years
Foundation	20
Practitioner	40
Professional	40

Powering Up on Knowledge:

20th Annual APMP International Conference

By Jeannett Waldie, APM.APMP

The 20th Anniversary Annual APMP® International Conference & Exhibits was held at the beautiful Sheraton Wild Horse Pass Spa and Resort in Chandler, Arizona. The resort is in the Sonoran Desert on an expanse of rugged Arizona landscape where the ancient vistas, mountains, and roaming wild horses remain untouched.

Owned and operated by the Pima (Akimet O'otham) and Maricopa (Pee Posh) tribes, the hotel is designed to reflect the art, legends and culture of the Gila River Indian Community. A 2-1/2 mile replica of the Gila River meanders through the resort grounds.

Table 2. Example of Earning CEU Credits

Type of CEU Level	Number of CEUs	Frequency	Total
Local Chapter Board Member	15	Annual	15
Attend Local APMP Chapter Meeting	5	6 times/year	30
Attend APMP Annual Conference	10	Annual	10
Published Articles	3	Quarterly	12
Total			67

Members are randomly audited, so it is important to document your CEUs.

But how do you earn CEUs? It is easy! As Table 1 shows, the CEUs you can earn through taking seminars, even webinars, as well as attending and taking part in conferences. You can even earn CEUs by writing an article for your local chapter newsletter or one of APMP's publications.

As Table 2 shows, earning a CEU is as easy as attending your local chapter meetings. If you present at a chapter meeting, you get double credit – both for attending and for presenting. You also can earn CEUs by serving on your local chapter board or on a committee. For example, this is how I regularly earn CEU credits.

As you can see, by just attending local chapter meetings and the conference, I have met my CEU requirements for Practitioner level in just one year!

Continued on page 5

I stayed in the Pima wing of the hotel. Every detail of the room reflected the beautiful culture of my hosts.

After I got settled in my room, I went over to the conference facility to join the reception, which was set up outside. The weather was perfect, a cool 80 degrees with no humidity. Everyone then moved into the grand ballroom for a "Welcome Back" ceremony. (The conference had been held here in 2005.) The ceremony started with community singers chanting to a rattle.

(Continued on page 4)

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/>

20th Annual Conference

(Continued from page 3)

Then the dancers arrived performing a traditional basket dance. The women held beautiful woven baskets in their hands, decorated with different designs. We were greeted by our hostess who told us the history of the Pima and Maricopa people and about the design of the resort. Then, she was joined by a spiritual lead of the tribe who told the story of the man in the maze.

During the ceremony, David Winton, APMP's Executive Director, announced the 2009 class of Fellows who joined the APMP Fellows on stage. To honor APMP's 20th conference, a blessing was given to honor our association's

elders. You can learn more about this amazing culture at <http://www.gilariver.org/index.php/about-tribe>.

In the morning, I woke up to a beautiful sunrise reflecting on the Santan Mountains. I went for my morning walk along the river and enjoyed looking at the variety of native plants used for landscaping. I even saw a jackrabbit. The river is a great way to get to the other resort facilities, including the Aji Spa & Salon, Whirlwind Golf Club, the Koli Equestrian Center and the Wild Horse Pass Casino. For those who didn't want to walk, scenic boat rides were available throughout the day and evening.

The conference started with a bang to the funny bone with the Proposal Guys, BJ



Lownie and Jon Williams, serving as Masters of Ceremony. Then the Keynote Speaker, Dr. Terry Bacon, gave a great speech about how to improve team performance through adaptive leadership.

(Continued on page 5)

Value and Use Graphics Effectively

(Continued from page 2)

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. Here are the three steps:

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

the final graphic is successful. (For more about this three-step process visit www.BillionDollarGraphics.com)

Give your technical staff a three-step process that will make it easy for them to convert their words and ideas into clear, communicative, compelling graphics.

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.) ■

Mike Parkinson is an internationally recognized visual communications expert, multi-published author, and graphics trainer. In 2008 Mike received the prestigious APMP Fellow award. He is a partner at 24 Hour Company (www.24hrco.com) specializing in bid-winning proposal graphics. His Billion Dollar Graphics website (www.BillionDollarGraphics.com), Billion Dollar Business Graphics book, and BizGraphicsOnDemand.com empower proposal professionals to increase their win rates using clear, compelling graphics. For more information, contact Mike at mike@24hrco.com.

CEUs

(Continued from page 3)

So how do you track and record your CEUs? It is totally up to you. Here are some suggestions.

- Keep a record card in your wallet and have your meeting registrar sign it when you register for your APMP meeting.
- Keep a file with copies of your registration receipt for local chapter meetings.
- Keep an electronic or paper file of articles you write, presentations you give, etc.
- Keep receipts and records of any webinar or non-APMP training you attend; include a 350 word (or less) summary of that training.

Whatever format your CEU log takes, it must include:

- A record of those activities that have helped improve competence and/or effectiveness,
- An explanation of the benefit derived from each activity undertaken,
- The date on which each activity was undertaken,
- The nature of the activity (e.g. home-based reading, conference), and
- The number of hours attributable to each activity.

If you haven't been tracking your CEUs, don't panic. Most chapters keep track of who attended what meetings. Ask your chapter secretary for a copy of the records. Then create your record and maintain it on a regular basis.

If you have any questions on accreditation, feel free to contact the Accreditation Steering Committee at accreditation@apmp.org or me at jeannette.waldie@att.net.

20th Annual Conference

(Continued from page 4)

Then it was off to sessions. With six tracks, sometimes it was hard to choose between all the great presentations. They covered the whole range of our profession—from business development and capture planning to organization tools, to managing stress and ourselves, to graphics to production. Texas was well represented with Amy McGeady, Chair of the Central Texas Chapter and Central US Regional Director. She presented on The Art of the Question—how to use a proposal's Q&A period for strategic purposes. Many of you will remember Amy from her presentation to the Houston Chapter last April.

The Man In The Maze
The labyrinth design , often used in basket weaving and silver jewelry, depicts experiences and choices we make in our journey through life. In the middle of the maze, a person finds their dreams and goals. When one reaches the center, we have one final opportunity (the last turn in the design) to look back upon our choices and path, before the Sun God greets us, blesses us and

More than 500 attended the conference from around the world, which is remarkable in this economy. On Wednesday, we had a lunchtime meet-and-greet with the Texas chapters. Once again we had three full tables. Other Houston members who attended were Meg Leachman and Tim Budzik. I also had the chance to attend a breakfast meeting with other Chapter Chairs, where we got to trade ideas and best practices.

The quiet ambiance of the hotel, combined with the great ideas and lessons I learned and meeting other folks who are just as passionate about pro-posals as I am, provided the perfect break. The value of attending the conference? Priceless! ■



The view from my hotel room overlooking the river walk and the mountains.
 Photo by Jeannette Waldie



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

Final Draft is the official newsletter of the Greater Houston Chapter of APMP. All content is copyrighted and authors retain rights. Unless otherwise stated, the views expressed in this newsletter are those of only the authors and do not necessarily represent the views of the Greater Houston Chapter of APMP or the APMP National Organization.

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.

Welcome to...

New Members

Help the Greater Houston Chapter of APMP welcome two new members:

- Gail Siegel (no company affiliation)
- Nick Hooten, United Space Alliance



Tim Budzik presenting at the June Houston APMP meeting, discussing the roles and skill sets needed in our ever-changing workplaces.

Capture Management

(Continued from page 1)

of the Association for Proposal Management Professionals (APMP), Robert Morse's discussion will focus on an overview of the capture process and will provide a snapshot of a capture manager's responsibilities, needed skills, and roles in a company as an opportunity is developed, proposed, and, ultimately, won or lost.

Robert S. Morse is President of RSM & Associates and a member of the Greater Houston Chapter of Association for Proposal Management Professionals. With more than 32 years of project management and business development ex-

perience in the industries of defense, aerospace, design and construction, process, environmental and energy, Morse and his firm provides enterprise consulting, campaign strategy, competitive analysis, and proposal management services to leading companies and emerging small businesses. His particular expertise in campaign strategy, earned value management systems (EVMS), and project management led to multiple successful must-win strategy and proposals for major defense firms.

New location—The August 5 meeting will begin at 11 am at Brown & Gay Engineers, Inc., 10777 Westheimer Road, Lubbock Conference Room, 3rd Floor, Houston. Admission is \$20 for members, \$25 for nonmembers, and \$15 for students (student ID required), and includes lunch. Seating is limited. ■