

The Association for Proposal Management Professionals - Houston



Final Draft

2010 Meetings

Houston Chapter

Wed, April 7, 11 AM–1 PM
Seating is limited; RSVP by
Mon, Apr 5, to Janet Dodd:
janet.dodd@kbr.com

2010 General Meetings

First Wednesdays, 11 AM–1 PM
April 7, June 2, August 4,
October 6, and December 1
Location:
Brown & Gay Engineers, Inc.
Lubbock Conference Room,
[10777 Westheimer Rd](http://10777WestheimerRd.com)
3rd Floor, Houston, Texas

2010 Board Meetings

First Wednesdays, 11 AM–1 PM
May 5, July 7, September 1,
and November 3
Location:
AECOM, 5757 Woodway #101

Lone Star Chapter

2010 General Meetings, 6 PM
April 14, June 16, August 11,
October 13, December 15
[CHIC from Barcelona Restaurant](http://CHICfromBarcelonaRestaurant.com),
11909 Preston Road, #1426
Preston Forest Square, Dallas

Central Texas Chapter

2010 General Meetings, 6 PM
May 6, August 5, November 4
Contact chapter officer(s) for
time and location; RSVP to
apmpcentraltexas.com

Greater Midwest Chapter

Wed., April 21, Christopher
Avery presents “The Leadership
Gift: Unlock Your Mind’s Innate
Power to Create, Choose, and
Attract - The Essence of Leader-
ship Everyone is Born with, but
Few Understand and Master”

2010 General Meetings,

3rd Wed, 12–1 PM
Contact chapter officer(s) for
meeting time and location

What is your Plan B ?

April 7 Meeting Presenter: *Richard Ogle, PhD*

It is doubtful very many members of APMP set out college to become proposal writers, proposal managers, or any of the other areas of specialization that fall under the APMP umbrella. Nevertheless, most of us have found a satisfying career in at least some niche of the field. The one common skill that most people in the proposal business have in common is to write clearly and persuasively. At the April meeting, Richard Ogle of University of Houston –Downtown will cover some of the career paths he sees graduates of the Professional Writing Program taking when



Richard Ogle, PhD

equipped with the skill of writing about technical subjects clearly and persuasively.

He also will cover the wide variety of opportunities available to someone with experience in developing proposals. The skills set developed in one field frequently is directly applicable in a multitude of other fields. In education alone, several different niches are available

(Continued on page 8)

How to Make the Right Graphic and Avoid the Wrong Graphic

By Mike Parkinson, The Graphics Guru

Reprinted with permission from [24-Hour Company](http://24-HourCompany.com), November 2009 e-Zine.

Recently, I was asked, “I need to show an ‘XYZ’ process (this could be any specific action, concept, or thing) but cannot find an example. What should I do?” There are two steps to resolve this challenge.

Step 1

Determine your ultimate goal for showing an “XYZ” process.

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From the Prez: Spring is here

In Houston the beginning of March saw the successful launch of the Annual APMP Texas All-Star Symposium. The conference brought new interest in APMP from Texas proposal professionals.

The Chapter also continues to build its relationship with the University of Houston–Downtown with our April general meeting presentation by Richard Ogle.

I am eager to attend my fifth APMP International Conference. This year the

conference is in Orlando, Florida, from June 1 through June 4. I always leave with new information, better techniques and a feeling of being recharged. I hope you will consider joining me there.

Enjoy the weather! I look forward to seeing you soon.

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

Congratulations to Doug Green of Translation Source!

Doug Green won the Greater Houston Chapter’s February meeting drawing for free registration to the March 5 APMP Texas All-Star Symposium at the Sheraton Houston Brookhollow Hotel.

Welcome New Members

The Greater Houston Chapter welcomes the following new members.

- Emily Cook, GC Services
- Kimberly Langhans, Siemens Energy
- Charles Todd, TEEX
- Ruth Marcom, Baylor College of Medicine

APMP Texas First Annual All-star Symposium Attendees absorb diverse sessions, extend relationships

By Andrés Cordero, Jr.

Under the theme “Great Leaps and Great Minds: Tools and Technology for a Successful Mission,” more than 80 business development and capture and proposal professionals from across the U.S. convened in Houston March 5 to extend relationships and learn about best practices in their profession.

The one-day event, APMP Texas First Annual All-star Symposium, was hosted by the Central Texas, Greater Houston, and Lone Star (Dallas-Fort Worth metroplex) Chapters of the Association of Proposal Management Professionals (APMP). Training, discussions, and vendor information supported proposal management attendees.

Workshops included:

- The Power of an Effective Proposal Review Process
- Focus to Win



Jeannette Waldie, Symposium Coordination Committee Chair, visits with Jennifer Fuller (right) of Platinum Sponsor Xait.

- You Must be Present to Win
- Ethics in Professional and Proposal Writing

In addition, several panel sessions offered such topics as federal, state, and

local proposal opportunities, technology in proposal management, and capture planning.

“We heard several positive comments about the quality of the sessions, the program format, the events, and the resources offered,” said Jeannette Waldie, APM, APMP, president of the Houston Chapter of APMP and Chair of the Symposium Coordination Committee.

“We had great presenters, outstanding materials, and many opportunities for attendees to meet with colleagues, vendors, and subject-matter experts to help them develop professionally. It was great first-time statewide symposium for

(Continued on page 7)

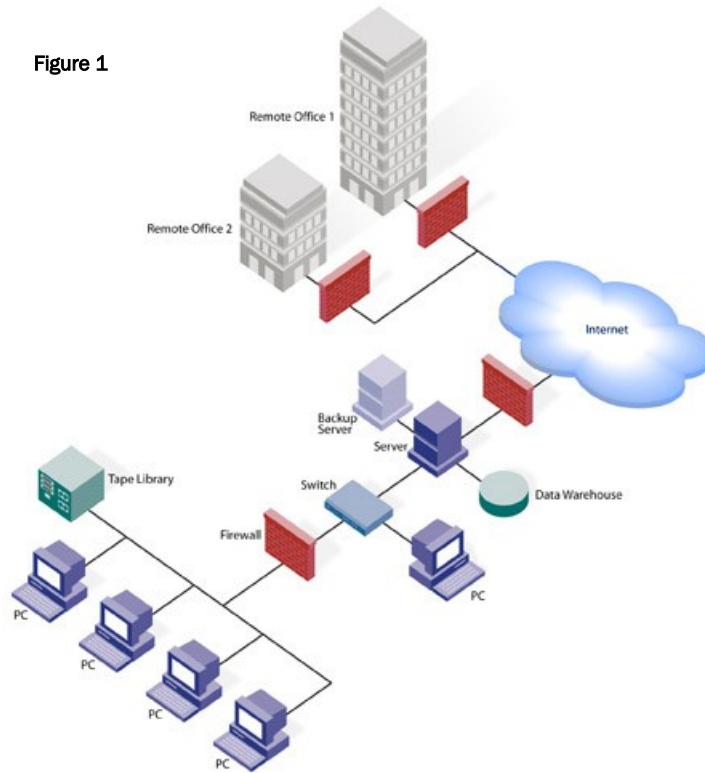
How to make the right graphic...

(Continued from page 1)

(Uncovering your graphic's goal is essential when creating any type of graphic—process, organization, overview, etc.) For example, is it to simply communicate the steps in the process or is it to show how the “XYZ” process is a superior solution? I call this step determining the primary objective. In my experience, most proposal graphics—more than 80%—fail because the author of the graphic has not determined the correct primary objective.

Recently, I supported an IT bid. My client (we'll call them ABC Company) needed to show that their solution achieved their future client's goals, which we later determined were lower cost, increased network speed, and greater uptime. Unfortunately, the engineer tasked had not formalized his primary objective. His approach was to develop a network diagram. Figure 1 is an

Figure 1



example of a generic network diagram similar to the graphic used. (The graphics

in this article contain none of the original information, but the concept is similar enough for this explanation.)

The engineer, who was very familiar with the future client's current network, noted, “By restructuring their network, they would lower costs, reduce risk of down time, and increase overall speed.” He was on the right track but knew it was unlikely that their future client would link his graphic with their specific goals.

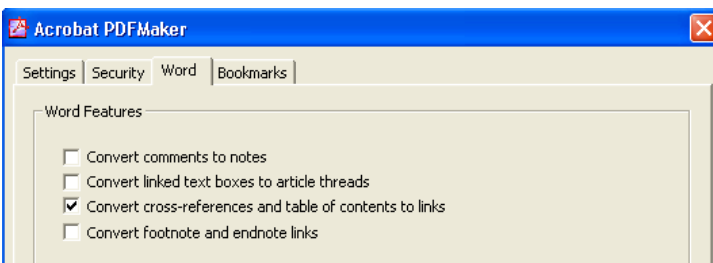
(Continued on page 5)

Retain linked tables of contents in PDFs

By David Wallis

Regular users of Microsoft Word® know that automatically generated tables of contents also function as hyperlinks to quickly navigate a document. It is possible to retain these links even after a Word file is converted to PDF provided you follow the correct steps. In Word:

- Click on the “Adobe PDF” menu item at the top,
- Select “Change Conversion Settings,”



- Select the “Word” tab in the dialog box,
- Check the third item (“Convert cross-reference and table of contents to links”) to convert TOC to links,
- Click “OK” to exit this box.

Then, make sure to create the PDF using the first icon in the “PDFMaker” toolbar, which is typically added to Word when Adobe is installed.



Note that using the “File, Print” method of creating PDFs does NOT preserve hyperlinks.

About David Wallis

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.

When good enough is good enough

Learning to balance perfection

By Jeannette Waldie, APM.APMP
AECOM

This article follows up Jeannette's February presentation to APMP-Greater Houston Chapter meeting about getting the best from your proposal team.

It's a typical day in a small proposal center. Three proposals have crossed my desk:

- For the first one, the company has established a good relationship with the client, has real intelligence, has positioned the project lead, and has identified key issues—client hot buttons and solutions. The company has a real chance of winning this project, which has been declared a “must-win.”
- For the second one, the company knew nothing about it before the RFP was released. The company does not have a strong relationship with the client, but the project lead has a strong history with the client from another firm and the company has lots of strong experience. There is a 50/50 chance of winning. But this is a great opportunity to submit a strategic proposal to position the company for the next project.
- For the third one, the company knew nothing about the RFP before release. The project lead has not taken time to meet with the client during the past several months and can tell me nothing about why the client is issuing the RFP. He

assumes we will win because we've won jobs before. The chance of winning is small.

All three are due in two weeks. Do I try to put the same effort into all three proposals and work myself into the ground or do I use my time strategically to put in a

quality effort for all three? I used to struggle with this challenge all the time.

Recognizing that our best effort is dependent on the situation can be difficult for us to recognize. The best level of effort needs to match the situation. My best effort when I am working with a star team is different from when I am on a short-fuse schedule and have not gotten enough rest. My best effort for a short-fuse proposal will not be the same as on a well-planned, long-lead opportunity. A document that just has to be compliant does not require the same high level of writing and graphic design as a “must-win” opportunity. But I used to think I had to deliver the same quality proposals no matter what.

Proposal professionals are perfectionists and sticklers for detail. That is what makes us great at our jobs. But sometimes it can also be a hindrance. Perfectionism can lead

to a negative response such as:

- Frustration
- Single-mindedness
- Inflexibility
- Sense of failure

This can greatly increase our levels of stress and reduce our ability to create quality proposals. Recognizing that “good enough” is sometimes the best solution to being effective when faced with multiple deadlines. This does not mean you are not doing your best on everything. It only means that you are effectively planning your work to produce the most optimum results.

“
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”

It is critical to find the right balance. All three proposals would suffer if I work myself into the ground by not getting enough rest and not eating right. The number of errors would increase, my writing would suffer, and it could impact the “must-win.” By understanding when to apply “good enough,” I am able to step outside the stress and approach my work from a clear place.

For example, the three proposals illustrated above call for different levels of effort:

- For the first RFP, I will spend the

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How to make the right graphic...

(Continued from page 3)

Upon further discussion, we determined that ABC Company was doing more than restructuring their future client's network architecture to achieve these goals.

Uncovering the primary objective usually results in a completely different graphic. Let's take a look at an example of the resulting superior graphic approach (Figure 2).

(Here's a secret: Your primary objective is most likely your caption. For example, this graphic's caption would be: Our three-step XYZ process ensures lower cost, increased network speed, and greater uptime.)

Step 2

When faced with developing a graphic with specific content you want to find examples of graphics that show the same concept. I recommend four resources:

Google Images (images.google.com).

Type in your concept and see what pops up.

BizGraphics On Demand

(www.bizgraphicsondemand.com) Again, type in your concept and see what images appear.

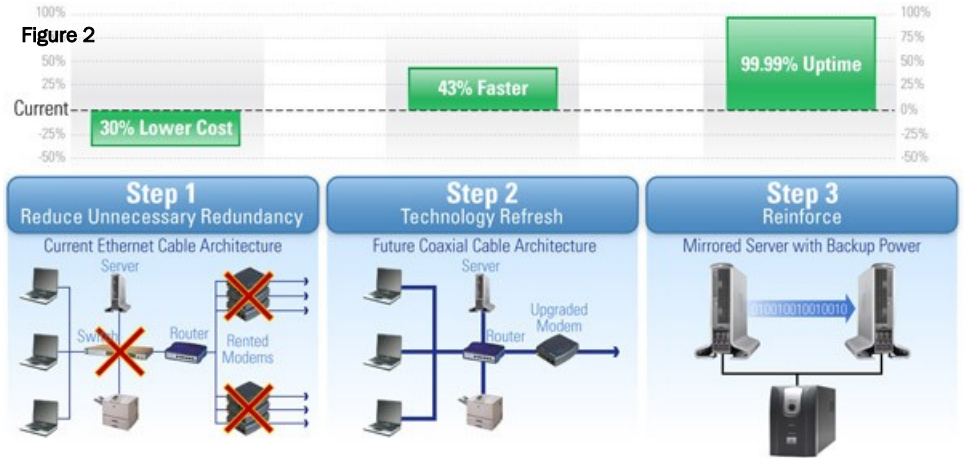
Business Graphics Library

(www.billiondollargraphics.com/businessgraphiclibrary.html). Browse the library and find applicable concepts.

Visual Literacy Periodic Table

(www.visual-literacy.org). Look for ideas.

Your goal is not to find an example of an "XYZ" process but rather to find similar concepts like flow charts, cyclic processes, and step-by-step graphics. The concept is key. Next, tailor the graphic concept to meet



your needs by adding your information.

I recommend that you start with graphics that share the same concept. This step eliminates the "blank page syndrome."

Leverage a graphic with a similar primary objective and tailor the content and graphic elements to meet your needs.



Mike Parkinson

About Mike Parkinson

Mike Parkinson is an internationally recognized visual communications expert and APMP Fellow. 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) and *Billion Dollar Business Graphics* book share best practices and helpful tools with proposal professionals. Contact Mike at mike@24hrco.com or call 703.533.7209.

Editor's note: Now earn 5 to 10 continuing education units through APMP by attending Mike Parkinson's trainings on conceptualizing proposal graphics. Contact Mike for more information. 24 Hour Company also provides free onsite training: <http://www.24hrco.com/designing.shtml>.

Bookmark server links

By David Wallis

Add remote server links to your "Favorites" and it's easy to find them again. If you often access various folders across your company network, you can save time by saving them as "Favorites." Once you are viewing a folder on the network, simply go to "Favorites" in the menu and click "Add to Favorites." The list is shared between Windows Explorer and Internet Explorer so you may want to create a subfolder called "Server Links."

About David Wallis

David Wallis is a senior proposal manager for [Halliburton](http://Halliburton.com)'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.

Good enough...

(Continued from page 4)

most time in advance planning and request resources to produce targeted graphics. I will schedule a fair amount of time to develop targeted sections with themes included throughout. I will also schedule at least one day doing a thorough edit of the document to make it one voice and client-focused.

- For the second RFP, I will spend time meeting with the project lead to learn his history with the client and get his input on the best way to present our firm's capability. I will then focus on developing a good story about our capabilities and give the project lead responsibility for writing his resume and the project approach. I will build the schedule based not only on this effort but also will consider milestone conflicts with the first RFP. But I will not invest the same level of effort as on the first one.
- The third RFP I will build using boilerplate text, including project data and resumes, with editing to provide readability, consistency, and client references. I will work with the project lead to make sure he understands what is needed for compliancy for his sections. I will develop this proposal with the aim toward compliancy and presenting a professional image to the client.

Each of these proposals will be quality, complaint documents, but the level of effort will be matched to the opportunity. By looking at my workload critically and establishing priorities and clear goals, I am able to effectively manage all three proposals without working until midnight every night.

By learning to balance perfectionism with "good enough," you, too, can improve your efficiency, produce winning solutions and still go home smiling in time to enjoy dinner.

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/>



Amy McGeady (center), Ph.D., AM.APMP, and representative of Platinum Sponsor Propel Consulting, shares information with event participants.

Register now for the 21st Annual APMP® International Conference & Exhibits scheduled for June 1-4, 2010, at Walt Disney World Dolphin in Orlando, Florida.



[CLICK HERE](#) for More Conference Information

Texas All-star Symposium

(Continued from page 2)

our Texas-based chapters, and we hope that those who attended discovered real value during the event.”

Daniel C. Brandenstein, Executive Vice President and Chief Operating Officer of United Space Alliance, and former astronaut, delivered the luncheon keynote address on the importance of leadership and transition. Friday morning’s opening address by B.J. Lownie, Director of Strategic Proposals, LLC, offered his perspectives on the profession and how to make the most of the learning and networking opportunities that would be available throughout the day.

To those who were unable to attend this year, we hope to see you at the next Texas symposium. Watch our website and future newsletters for announcements.

The event committee would like to recognize the sponsors of the symposium:

Platinum sponsors: Propel Consulting and Xait, for their financial support

Gold sponsors: 24-Hour Company, Shipley Associates, and The Sant Corporation

Silver sponsors: Strategic Proposals, LLC, and Proposal Software, Inc.

Bronze sponsor: Shea Writing and Training Solutions, Inc.

About the APMP Texas Symposium: *The goal of the APMP Texas Symposium was to bring together proposal and grant management professionals committed to excellence in their professions to learn more about trends, skills development, and best practices, to gather information from vendors and others providing products, services, and support to those efforts, and to develop lasting professional relationships with other colleagues in the business development, proposal and grant management arena.*



David L. Winton, F.APMP, Executive Director of APMP (Center), visits with Raquel Sheppard and Pat McDaniel of ABB, Inc.



During the opening session of the 2010 APMP Texas Symposium, attendees participate in an icebreaker to create connections and share expectations.



Mark Wigginton, Regional Director, Shipley Associates, moderates a discussion on the influence of the capture manager in the phases of a business development opportunity with guest panelists.



2009 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.

Plan B

(Continued from page 1)

from K-12 schools to junior colleges to four year universities, all of which are competing for funds. Within Houston's Medical Center, billions of dollars per year are acquired through competitive proposals. Nonprofit organizations, large and small, look to foundations for funding a wide variety programs. Even the same local and state government organizations that APMP members normally look to as clients also submit proposals for federal grant funds.

With the present economy, having a career backup plan always is a good idea.

Richard Ogle is a Visiting Assistant Professor in the Professional Writing

Program at the University of Houston—Downtown. Within the Professional Writing Program, Dr. Ogle specializes in teaching courses involving sciences and proposal writing. He teaches both an undergraduate and a graduate course in proposal writing. He comes to his present position after 40 years of proposal preparation in a variety of environments ranging from international organizations to private industry, as well as federal and state governments.

Attend the April 7, 2010, meeting of the Greater Houston Chapter of the Association for Proposal Management Professionals (APMP) at Brown & Gay Engineers, Inc., Lubbock Conference Room, 10777 Westheimer Rd., 3rd Floor, Houston, Texas.

Seating is limited; RSVP by Monday, April 5, to Janet Dodd:

janet.dodd@kbr.com providing your name, company name, and membership status (APMP member, non-member). Admission includes lunch and is \$20 for members, \$25 for nonmembers, and \$15 for students (student ID required).

Email Meeting Announcements

To receive email announcements of each Greater Houston Chapter's upcoming meeting, send an email request to:

janet.dodd@kbr.com

Please provide your name and email address.