

The Association for Proposal Management Professionals - Houston



# Final Draft

## 2011 Meetings

### Houston Chapter

Wed, April 6, 11 AM-1 PM  
 RSVP by Mon, April 4  
 to Janet Dodd:  
[janet.dodd@kbr.com](mailto:janet.dodd@kbr.com)

### 2011 General Meetings

First Wednesdays, 11 AM- 1 PM  
 April 6, June 1, August 3,  
 October 5, and December 7  
 Location:  
[HESS Club](#)  
[5430 Westheimer Rd](#)  
 Houston, Texas 77056

### 2011 Board Meetings:

First Wednesdays, 11 AM-1 PM  
 May 4, July 6, September 7,  
 and November 2.

### Lone Star Chapter

2011 General Meetings, 6 PM,  
 April 13th, June 15, August  
 17, October 19, November  
 16. Location:  
[CHIC from Barcelona](#)  
[Restaurant](#), 11909 Preston  
 Road, #1426. Preston Forest  
 Square, Dallas. RSVP to  
[www.apmplonestar.org](http://www.apmplonestar.org)

### Central Texas Chapter

Networking Happy Hour:  
 March 24  
 Quarterly Meeting, May 5  
 Location and topic TBA.  
 RSVP to  
[apmpcentraltexas.com](http://apmpcentraltexas.com)

### 22nd Annual APMP® International Conference & Exhibits

Sheraton Downtown,  
 Denver, Colorado  
 May 31 - June 3, 2011

# Pre-Proposal Planning: A Key to Developing a Compelling Response

Join us for an exciting meeting on April 6 to learn how to improve your skills in pre-proposal planning from one of the top experts in proposal management.

Let's face facts. Regardless of your market, competition is increasing as is the quality of the competitors. In today's business



Mark Wigginton, APM, APMP

environment, just delivering a compliant proposal is a recipe for losing.

Pre-proposal planning is critical to a winning response. In Shipley Associates' Business Development Model more than 2/3 of the activities occur before the RFP is released. Mark Wigginton will discuss key activities that can lead

(Continued on page 7)

## Did you know...?

By David Wallis

...Double-clicking the "Format Painter" will keep it active until you un-click it?



This is VERY USEFUL. For example, if you have many paragraphs that you need to format a certain way, do the first one manually, highlight it, double-click the format painter, then you can

simply continue to swipe over other paragraphs again and again and the new format will instantly be applied. Once you have finished, un-click the painter and it will then stop. By the way, Ctrl+Shift+C then Ctrl+Shift+V will do the same thing.



(Continued on page 5)

## In This Issue ...

<a href="#">President's Corner</a>	2
<a href="#">Welcome New Members</a>	2
<a href="#">Helpful Web Pages</a>	2
<a href="#">Get Those Valuable Initials</a>	3
<a href="#">Come Join Us: 2011 Membership and Attendance Drive</a>	3
<a href="#">Searching the Internet</a>	4
<a href="#">22nd APMP Conference</a>	5
<a href="#">Help Wanted!</a>	6
<a href="#">In Appreciation</a>	7

## President's Corner

**By Marlane J. Kayfes,  
M.S., President, APMP  
Greater Houston Chapter**

If you didn't make it to the February chapter meeting, you missed a great adventure and kick-off to the Greater Houston Chapter's 2011 locomotion.



attention. Many people took notes, many asked questions. Unfortunately another rolling blackout cut short her slide presentation. But by candlelight, Sara, a true professional, persevered and summarized the information she couldn't

Sixteen determined souls braved freezing temperatures February 2 to come to the Houston Chapter meeting. Upon arrival at the HESS Club, many of our attendees were greeted by facility staff who, manned with flashlights, escorted them to our lower level meeting room. Candles lit the room, casting a cozy glow and intimate feeling. Although the rolling blackout set back the meeting schedule a little, lunch was served soon after the electricity returned.

Just as the HESS Club staff barely lost a step in their remarkable service, so, too, did our speaker, Sara Worthy, push forward with barely a hiccup. Her presentation about researching the competition on the Internet held our rapt

show us. The presentation will be on the chapter's website and I'm sure Sara would welcome discussion during the networking time of future meetings.

It just went to show what can happen when commitment and good humor prevail. People overcome barriers and make the best of a situation.

### Annual International Conference & Exhibits

March 31 marks the end of early registration for the 22nd Annual APMP® International Conference & Exhibits. I've attended a few professional conferences in the past but this will be my first APMP International Conference. And I hope to see some familiar faces.

### New Meeting Features

We introduced a couple of new items in February. One is a job board. Yes, we have some job postings on the chapter's website, they and others are posted on our meeting job board. Also, if you're looking for a job, bring a postcard with your summary qualifications and contact information to post. We thought we'd try this new way of providing connections for members.

February launched our membership drive. You could become eligible to win one of two \$100 Amazon gift cards. Both gift cards will be awarded in February 2012. One will go to the name drawn of all new members who join APMP and affiliate with the Greater Houston Chapter in 2011. The other gift card will go to the existing member who brings the most first-time guests to a Houston general meeting. Be sure to identify your guests to Janet Dodd when you come to a meeting so she can keep records.

On that note, I'd like to welcome our newest members from January and February. I hope to see one and all at the April 6 meeting.

## Welcome to our New Members!



Arthur Runno, American Critical Systems, Inc.  
Sonya Wooley, Mammoth Technologies, LLC  
Camilo Munoz, Translation Source Ltd.  
Andrea Dunn  
Jerry Campbell, Hamilton Sundstrand Space Systems

### Helpful Web Pages

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

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

<http://proposalcafe.com>

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

# Get Those Valuable Initials: Resources for obtaining APMP Accreditation

## By Jeannette Waldie, PPM.APMP

APMP's accreditation process can be challenging, but it does not have to be intimidating. There are three levels that let you put valuable initials after your name:

- Foundation (AM.APMP)
- Practitioner (APM.APMP)
- Professional (PPM.APMP)

No matter what level of accreditation you are interested in, there is a wealth of resources to help you through the process.

### Support for All Levels

- **APMP Accreditation Website** at <http://www.apmp.org/ca-16.aspx>. You will find lots of information here. There are glossaries, study guides and sample forms to guide you through the process. There is an FAQ, information on the benefits of the

program to companies and individuals, and information explaining the requirements for Continuing Education Units (CEUs)

- **Accreditation Mentors** – These are accredited APMP members who have been trained to help mentor you through all three levels. Accreditation Mentors are passionate about the accreditation program and love to help fellow members achieve those valuable letters.
- **APMP Accreditation Program LinkedIn Group** – This group provides answers to questions and tips and tricks for obtaining accreditation.

### Foundation Level

- **Approved Training Organizations (ATOs)** – Several companies are approved trainers throughout the U.S. They offer training sessions that

include the exam. APMP is offering a Foundation Level training and exam session at the International conference in June. Check out the conference website for more information.

- **Quizlet:** Study group for the Foundation Exam, including cards to help learn terms and definitions for the Foundation exam. <http://quizlet.com/user/amoss200/>

### Practitioner Level

For the first time, APMP will be offering a one-day coaching and mentoring session for APMP Practitioner candidates at the June 2011 Conference in Denver. You will have an opportunity to work in a small group with an Approved Mentor. You will then submit your Proposal Practitioner Assessment Questionnaire™ on-line at the end of the day. Your

(Continued on page 6)

## Come Join Us: 2011 Membership and Attendance Drive

The Greater Houston Chapter of APMP announces its 2011 membership and attendance drive. You could win one of two Amazon \$100 gift certificates. Here's how.

1. Bring your colleagues to the Chapter general meetings throughout 2011. Members only are eligible. Make sure to tell the person at the registration desk (usually Janet Dodd) who is your guest so you get proper credit. For ease



in recordkeeping, guests and hosts must be noted the day of the meeting. Repeat guests will not be counted in this tally, only first-time guests.

2. Join APMP and claim the Greater Houston Chapter as your chapter affiliation. All new memberships during 2011 will be eligible to be entered in the drawing.

Winners will be announced at the February 2012 meeting after results have been tallied and verified through the APMP International Records.

# Searching the Internet Part 2 – Gain Client and Prospect Insights from Social Networking

By Sara M. Worthy

In Part 1 of *How to Find Almost Anything on the Internet* I gave some quick tips on search terms. During my presentation at the February luncheon, I was asked some great questions about how to find out information about your clients and the people who are submitting the RFPs. My goal in writing these high-tech internet articles is to tailor it to answer proposal managers' questions specifically so you can write better proposals and win more bids. So in Part 2, I am going to elaborate on my presentation "Using the Internet for Competitive Intelligence Research" and show you how to use the same online tools and resources that you would use to research your competition in order to research your clients and prospects.

Social networking sites like Facebook, LinkedIn, Twitter and others offer a lot of valuable information about companies and their employees if you know how to search them. For example, in LinkedIn you can search for a company or a person's name. If you search for a company, then you can "follow" the company and receive updates on changes to any postings by the company and employee postings and changes. This allows you to begin creating an organizational chart with names and positions inside a prospective or client company. If you are connected to a client, you can see their interests, groups, events they have RSVP'd for, and see who is viewing their profile.

By researching who else is viewing your clients, you can see potential competitors and vendors. If you see that a competitor has been viewing and communicating frequently with a client or prospect – then there is a good chance you can predict who will be bidding against you. If your client or prospect is attending an event hosted by your

competition, then you can also learn more about how strong that relationship is. In the situation where several companies are competing for a project, viewing which ones are most actively conversing with your prospect can help you see which are most likely front-runners.



Sara Worthy speaking at the February meeting of the Greater Houston Chapter.

“  
 . . . following the activities, conversations, and connections of your clients and prospects online will help you understand their personalities, . . .  
 ”

Relationships are critical in business and following the activities, conversations, and connections of your clients and prospects online will help you understand their personalities, hobbies, interests, and build a stronger understanding of how you are positioned against your competition from the perspective

of your clients. Managing the vast amount of information can be very difficult, and that is why you will want to prepare a spreadsheet and list of questions and goals that you specifically want to find out before you start wading through the different sites online to gather the information. Try to remain focused on the information you want to find out, without becoming too narrowly constrictive in your search that you don't see connections and relations to the other people and companies that are tied to your clients and prospects online.

If the information on social networking sites becomes too overwhelming at a point in the search then do what I always do: pick up the phone and call your client or prospect and just ask them for clarification, a cup of coffee (if they have

(Continued on page 6)



## Plan to attend the 22nd APMP Conference

Want to learn from the top experts in proposal management? Then plan to attend the 22nd Annual APMP® International Conference & Exhibits at the Sheraton Denver Downtown Hotel. Register before March 31st to receive special Phase 1 rates:

- Single Registration Phase 1 \$775.00
- Single Registration + Member Dues Phase 1 \$900.00
- Multiple Registration Phase 1 \$745.00
- Multiple Registration + Member Dues Phase 1 \$870.00

Dr. Tom Sant and Steve Myers will be keynote speakers. Dr. Sant is the premier expert in sales proposals. Steve Meyers is a highly successful serial entrepreneur and global thought leader on business competitiveness. Hotel reservations are available at <http://www.starwoodmeeting.com/Book/apmp2011>

The conference is also offering several pre-conference sessions:

- APMP-Foundation™ Level Accreditation Coaching and Examination
- APMP-Practitioner™ Level Accreditation Coaching and Examination
- Billion Dollar Proposal Graphics: How to Your Turn Text and Ideas Into Winning Visuals
- Wordman's Microsoft Word for Proposal Professionals

More information can be found at <http://www.apmp.org/2011-Pre-Conference/ca-192.aspx>.

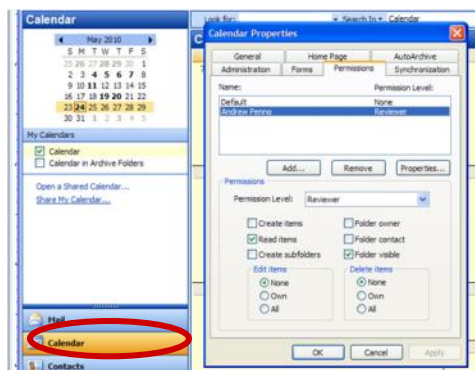
Do you need help explaining the value of attending the conference? APMP now has tools to assist you to communicate the value that attending the 22nd Annual APMP® International Conference & Exhibits can provide when justifying approval from your manager or company. For information and forms, go to <http://www.apmp.org/ca-225.aspx>.

## Did you know...?

(Continued from page 1)

**...You can resize table column widths without messing up other columns?** It's happened to all of us; you use the mouse to make one column in a table wider or narrower, but then all the other columns mess up. To avoid this, simply hold down "CTRL" at the same time (to adjust a single column while keeping the overall table the same width) or "Shift" (to adjust a single column while changing the width of the overall table the same amount).

**...You can give others the ability to see your meeting and appointment details**



**when they schedule a meeting with you (rather than just the blue bar with no details)?** As seen below, switch to calendar view, then click "Share My Calendar" on the left. You can edit the 'Default' permissions to give everyone

access or you can add specific people. Assign the "Reviewer" permission level and check "Read items." After this, the selected individuals will be able to see details of your meetings and appointments on the scheduling tab when creating meetings.

### 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 oil-field services tenders and is a member of APMP's Houston Chapter.

## Get Those Valuable Initials

(Continued from page 3)

reference will be reviewed by an APMP Approved Assessor prior to the conference to randomly check your application of the competencies assessed within your self-assessment. You will be invited back the following day for your result. There is no fee for this session beyond the exam fee. **Registration deadline is March 31.**

The fees for accreditation may seem intimidating, but consider:

- APMP's accreditation meets international standards. It is recognized around the world.

- Once you receive your accreditation, it is for your lifetime; as long as you maintain your CEUs and are a member of APMP.

Compared to one year's tuition at a local university, accreditation is a very inexpensive alternative. Compared to professional development seminars, such as American Management Association's Business Writing Workshop at \$1,895, it is also very reasonable. And the personal rate of return on your investment is high.

### About Jeannette Waldie

Jeannette Waldie, PPM.APMP, an APMP member since 2001, has over 15 years experience in developing and managing commercial and government proposals. Jeannette is an approved Accreditation Mentor for APMP.

## Searching the Internet, Part 2

(Continued from page 4)

time), or offer them your help in something unrelated and develop the relationship offline too.

A copy of my presentation and more complete notes are available and I am happy to answer any questions you have if I am able. Also, let me know specific questions about using the Internet in the

proposal management process and I will work to answer them in upcoming columns.

### About Sara M. Worthy

Sara Worthy is in digital marketing and sales for [Schipul: The Web Marketing Company](#). She has over 14 years of experience in digital marketing, exhibit sales and marketing, and technology. She spends her time split between exploring the Internet and running around Houston. She serves as Communications Chair for the Greater Houston Chapter.

For a copy of Sara Worthy's presentation at the January meeting and for past presentations, check out the Houston Chapter's Website at [www.apmphouston.org](http://www.apmphouston.org).

You can also find copies of past newsletters, announcements and job listings. Check it out today!

## Help Wanted!

The Membership Chair board position is currently empty. Daniel Maddux is currently handling both the Vice President and Membership Chair duties. Let's get poor Daniel some help!

### What does the Membership Chair do?

The Membership Chair is an important position on the APMP Houston board. You'll help with the new outreach campaign that APMP Houston has embarked on. This will include:

- Brainstorming new outreach ideas
- Reaching out to lapsed and unaffiliated members
- Assisting with membership outreach at chapter meetings
- Reporting to the board about the status of your efforts

Jumping into anything else you can think of that will grow our chapter in numbers and in value

### What if I want to help, but can't commit to being on the board?

You're welcome to serve on the Membership board without becoming Membership chair. Any assistance will be much appreciated.

### How do I get involved?

Get in touch with Daniel Maddux ([madduxd@gmail.com](mailto:madduxd@gmail.com)). He'll fill you in on any details that you need



2011 Board of Directors  
President - Marlane J. Kayfes  
Vice President - Daniel Maddux  
Secretary - Janet Dodd  
Treasurer - Fritz Rumscheidt  
Program Chair - John N. Owen  
Communication Chair - Sara M. Worthy  
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.

## In Appreciation

Thank you to all who help make the Greater Houston Chapter and its meetings a success. In particular, thank you to our in-kind sponsor **B&E Reprographics**, who prints duplicate receipts for the general meetings.

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](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.

## Pre-Proposal Planning

(Continued from page 1)

to a more compelling response. In this discussion, he will introduce the elements of Shipley's Proposal Planning Phase and focus in on a tool to increase your proposals' competitive and customer focus.

Mark is Shipley Associates' Regional Director for the South Central U.S. He has worked as a proposal manager and orals coach as well as facilitating Shipley's core curriculum of business development courses. He is an active member of APMP's Central Texas Chapter and speaks regularly at APMP Chapter meetings and National Conferences. Mark is an Accredited Member of APMP (AM.APMP).

The April 6, 2011, meeting of the Greater Houston Chapter of the Association for Proposal Management Professionals (APMP) will be at the [Houston Engineering and Scientific Society \(HESS\) Club, 5430 Westheimer Road, Houston, Texas 77056](#).

RSVP by 10:00 AM Monday, April 4, to Janet Dodd: [janet.dodd@kbr.com](mailto:janet.dodd@kbr.com) providing your name, company name, and membership status (APMP member, non-member). Or call Janet at 713-753-2261.

Admission includes lunch and is \$25 for members, \$30 for nonmembers, and \$20 for students (student ID required).