Bid & Proposal Con 2012  
May 22-25, 2012  
Sheraton Dallas Hotel – Dallas, Texas

Tuesday, May 22, 2012

7 a.m. – 7 p.m.  
Registration

8 a.m. – 3 p.m.  
Chapter Officers Leadership Workshop  
APMP Board of Directors  

APMP Foundation Level Prep and Exam  
Lohfeld Consulting

Down & Dirty Graphics and Desktop Publishing  
Mike Parkinson & Colleen Jolly, 24 Hour Company  
Register now, and learn how to effectively and efficiently use Microsoft Word 2007 for proposal development.

Proposal documents offer their own challenges when using Microsoft Word - figure artwork and captions integrated with the text, complex heading numbering, multiple contributors and reviewers... Learn how to get the very best out of Word with this one-day preconference training course.

All proposal professionals, especially production specialists, production coordinators, editors, authors, subject matter experts, etc.

What will you learn? Things you won't learn at a Microsoft Office Specialist (MOS) course:

- How to set up Word to be optimum for proposal development (i.e. stop Word "helping!")
- How to create robust styles and heading numbering for proposal templates, and how to insert foldouts
- How to integrate art and text, and use automatic caption numbering and cross referencing
- How (and when) to used tracked changes and comments, and how to manage personal information

Commercial Proposal Master Class  
BJ Lownie, Strategic Proposals
In support of APMP’s continuing effort to provide sessions highly relevant to those working on commercial proposals, a one-day workshop focused on commercial proposal development will be offered in conjunction with the 2012 APMP International Bid & Proposal Conference.

This one-day interactive workshop will provide participants with a solid understanding of commercial proposal development. Whether you are new to working on commercial proposals or have been working on them for some time, this workshop will provide a solid foundation upon which to build your knowledge and skills regarding the development of commercial proposals. Participants will have chance to learn, discuss and explore all of the phases of commercial proposal development, from pre-proposal to post proposal activities.

This informative and engaging workshop will be presented by well-known proposal expert and popular presenter, BJ Lownie, Director of Strategic Proposals. BJ has more than 25 years working on proposals, has extensive experience delivering proposal training and has had more than 10,000 people attend one of his workshops or presentations.

Attendance is limited to 24 participants. The workshop will allow for focused discussions, individual attention and the addressing specific questions participants may have.

This workshop is highly recommended for anyone doing commercial proposals. Register now!

8:30 a.m. – 4:30 a.m. Practitioner Completion Workshop
Charlie Divine, APMP

This intense full-day workshop is for members who would like to complete the Proposal Practitioner Assessment Questionnaire (PPAQ) and achieve Practitioner Accreditation status at the Dallas Conference. Participation in this workshop will require:

- Foundation level Accreditation
- Pre-registration for the Practitioner Assessment
- Advanced preparation of an experience inventory
- Study of the PPAQ Standards and Guidelines
- A full day dedicated to completing the 35 competency self-assessments with support from the Chief Examiner, Director of Accreditation and mentors.
- Follow-up work during conference to resolve any deficiencies

At the completion of this workshop members will have completed their professional Accreditation.
This half-day workshop is for any members who would like to understand how to complete the Proposal Practitioner Assessment Questionnaire (PPAQ). The workshop will include:

- Introduction to the PPAQ requirements.
- Discussion on how to use the PPAQ Standards and Guidelines to build your competency self-assessments.
- Individual coaching to develop 4 to 6 compliant competency self-assessments.
- Understanding of how to handle some of the more challenging competency areas.
- On-going support to complete their PPAQ.

At the completion of this workshop members will have competed up to 8 of their self-assessment questions and have a clear understanding of how to complete their PPAQ within the next 4 to 6 weeks.

Join us, as we officially welcome all attendees to the Bid & Proposal Con 2012 kickoff event, at a high-energy, fun reception—complete with Texas-style entertainment.

Bid & Proposal Con 2012 is presented in association with the Association of Proposal Management Professionals® (APMP®) and its Lone Star and Greater Houston chapters.
8:30 a.m. – 9:00 a.m. Opening Presentation

The Great Debate: Examining Proposal Realities and Myths
Featuring APMP’s Sketch Comedy Troupe, The Type Os
You’ve heard the stories – a government proposal supported by teams of 1,000+ people or a commercial proposal, with a 2 hour turn-around time. What’s myth, and what’s reality? And who cares? It’s a commercial and government proposal face-off, using a format similar to a presidential debate. They’ll tackle these questions and others that the two candidates running for the White House couldn’t even begin to address. This enlightening and amusing debate is presented by the Type O’s – APMP’s own sketch comedy troupe.

9:00 a.m. – 9:30 a.m. Opening Presentation

What is a Proposal Professional?
Eric Gregory
Senior Vice President of Capture and Proposal Development, CACI
Join us on a grand romp through the labyrinth of what a proposal professional is, might be, should be and what they do. Mr. Gregory will challenge traditional notions of the role of proposal professionals, in this thought-provoking session.

Eric Gregory, Senior Vice President of Capture and Proposal Development, joined CACI in 1999 and has 35 years of experience in proposal, business development and capture management for major corporations such as Martin Marietta, Hughes Aircraft, and Litton Industries. He has led proposal and capture efforts in field engineering, chemical and biological detection and warning systems, anti-submarine warfare, surface warfare, UAV systems, electronic warfare, scientific support services, and information technology. He served on the Association of Proposal Management Professionals® (APMP®) Board of Directors from 1996 to 2006 and served three times as Conference Chair/Co-Chair for APMP’s annual conference. Eric received association’s highest honor, the William. C. McCrae Founder’s Award, is an APMP Fellow, and received APMP’s Insight Award. Eric also received CACI’s prestigious Victory Award and Thomas H. Moorer Awards.

9:30 a.m. – 10 a.m. Morning Networking Break, Refreshments

10 a.m. – 11:30 a.m. Pricing Matters: Strategy in Developing a Winning Price
Marsha Lindquist, The Management Link, Inc.
Many companies have great technical solutions, but winning a competitive procurement requires a winning price as well as a great technical proposal. In today’s environment of lean budgets and low cost awards, Price Matters more than ever. The winning price may or may not necessarily be the low price. But more often these days, it is the low price. We seem to get involved in the mechanics of filling out the forms and spreadsheets without much of a thought to what constitutes a winning price. It takes
getting information ahead of time, doing the analysis, and looking at you in the price mirror objectively. This session will explore the elements of a winning pricing strategy and how to develop one for your proposal.

Marsha Lindquist has more than 30 years of experience as a cost proposal manager and contracts professional. She is an expert in cost proposal management and development, pricing strategy, and price to win techniques. Ms. Lindquist is expert in developing persuasive and convincing presentation of pricing that wins and is masterful in authoring customer-focused winning pricing strategies highlighting features and benefits. Her experience includes price proposal management, price strategy development as well as a structured method for establishing basis of estimates, and interfacing with project management to institute a comprehensive work breakdown structure. Ms. Lindquist is a cost strategy expert, based on her financial, contractual, and business development background. Ms. Lindquist is a National Contract Management Association Fellow. Her agency experience has centered on DOD, DoE, NASA, AID, GSA, DISA, US Army Corps of Engineers, NIH, EPA, and Canadian Government Public Works.

It’s Not Just About the Graphics: Drafting Persuasive Action Captions
Larry Newman, Shipley & Associates

How long does an evaluator stare at your graphic before reading the caption? Do you really think that your graphics are immediately clear and persuasive on their own? From a perspective of more than 25 years of writing and reviewing proposals, the quantity and quality of proposal graphics has improved, proposals generally look better, but the action captions often continue to be missing, generic, and unpersuasive. Drawing inspiration from current media and numerous proposals, we will review fundamental principles, discuss best practice, review before and after examples, and actually draft and critique captions prepared by workshop participants. Focus on your message; worry less and invest less in your graphic.

Gaming the Competition: How The Psychology of Casinos Can Win You Your Next Bid

Mike Parkinson, 24 Hour Company
Colleen Jolly, 24 Hour Company

Ever found yourself compelled to do something? Spending more time or money then you intended? Learn how to influence your customer’s buying decisions in formal and informal proposals or presentations using the tools employed by world-class casinos. More than simple tricks, casinos employ scientifically proven, psychological devices in their physical layout, method of game play and even the smell of their casinos. Learn how to use these strategies to improve the structure and visual appearance of your bids to increase the chances that your customers will choose your solution. After this highly interactive and informative presentation full of statistics, scientific facts and stories of actual casino and bid-situations, we will play not one but three casino-type games to reinforce what we have learned with the “high roller” or one with the most chips, winning a special prize.

Mike Parkinson (PPF.APMP) is an internationally recognized visual communication expert, award-winning author and APMP Fellow. As an owner of 24 Hour Company (24hrco.com - the premiere proposal graphics firm), Mike has spearheaded multibillion dollar projects and created thousands of graphics resulting in billions of dollars in increased revenue for his clients. Using his 20 years’ experience, he authored the book, “Billion Dollar Graphics,” which shows busy professionals how to turn their words and ideas into winning graphics. Contact him at mike@24hrco.com and visit BillionDollarGraphics.com and GetMyGraphic.com for helpful proposal tools.

Colleen Jolly (PPF.APMP) manages a global visual communications company – 24 Hour Company – with offices in the US and UK. Colleen is active in the APMP and acts as Layout Editor and contributor to the Journal. She is Secretary for the International APMP, as well as the Secretary of the NCA chapter and was named an APMP Fellow in 2010. She is a frequent worldwide speaker and trainer on creative and general business topics. She holds a BA from Georgetown University and is active in arts and women’s non-profit organizations. Colleen is an award-winning artist and business professional—she was featured in Northern Virginia magazine’s ‘Top 10 Entrepreneurs Under 30’ and as a finalist for the Stevie Awards Creative Professional of the Year, 2009. Her company won entry into Inc. 5,000’s Fast Growing Companies in 2007 and 2011. She was published five times in a women’s entrepreneurial calendar.

What To Do If a Lemon Lands In Your Lap
Chris Hassler, Syndetics, Inc.
Jean Goolsby, Syndetics, Inc.

This session will help you improve your ability to evaluate if a proposal you have
been asked to manage is a loser, and what to do if it is. We will explore how to evaluate your company’s readiness to respond to an RFP and the factors to consider when performing a proposal assessment. These include the information that flows to you through your internal bid pipe process, the proposal strategy, programmatic, management and technical baselines and the resources available to you to manage the proposal. Communicating with your organization when you don’t feel you are in a strong position to win a proposal can be difficult. Sometimes the best path forward is to no-bid and other times your company can mitigate the weaknesses you uncovered and move forward with a winning proposal. We will share tips to help you communicate your assessment and recommend the best path forward.

**Chris Hassler**, President & CEO of Syndetics, founded this consulting firm to help clients win government business. Leveraging nearly 30 years of experience in business capture and proposal leadership, Chris developed a unique end-to-end campaign approach to strategy, business capture, program assessment, and proposal leadership for large, complex government programs. This approach has proven to be highly successful – aiding clients in winning over $45B in the last 7 years. He has provided program strategy support and executive counsel to virtually all major prime aerospace contractors. Chris has worked in the defense industry at both Lockheed Martin and Northrop. He served as a U.S. Naval officer in engineering and tactical operations billets as a Surface Warfare Officer. Chris graduated from the United States Naval Academy with a BS in Engineering Management and Technology and from the Naval Postgraduate School with an MS in Computer Information Technologies.

**Jean Goolsby** (AM.APMP) is a Senior Consultant for Syndetics. She has 29 years design, technical, and proposal management experience in government and commercial product development and research. Prior to joining Syndetics, Inc., she formed and managed a Proposal and Publications Department for ITT Geospatial Systems (GS). In that role, she established a divisional proposal process, recruited a staff of proposal managers and publication specialists, and built successful proposal support relationships with GS business units. She led the development of an internal training curriculum for proposal management, proposal writing and presentation skills. Jean trained and mentored proposal managers, engineers, technicians and support personnel. She has been a member of the APMP Cost Task Force since 2009. Jean has an MS degree and a BS degree from Rochester Institute of Technology in Electrical Engineering.

**Fine Tune Your Next Proposal**

**David Warley**, Bid To Win

Scales are not just for the practice room (or beginners). Seasoned performers* adapt their method to the work in hand and their performance to their audience and auditorium. The presenter will show how, applying the management themes developed by project management professionals,
proposal methods can be scaled to support small cases and large; from solo performance to orchestral mega bid. You will develop these ideas in group discussions with fellow attendees. Then, in a series of workbook based practical exercises, you will apply a simple step-by-step approach to create proposal strategies and win themes tuned to the needs of your audience. You will create structures that develop your themes and form the basis of a score that you can use to direct the proposal team and control the creation of your next proposal. So, whether you plan an a capella concert or a Wagnerian epic you will take away something to help you plan and deliver your next proposal. *Buskers not admitted

**David Warley**, PPM.APMP, is a business development professional and owner of Bid to Win Ltd. David is a frequent presenter at APMP conferences and an accredited Professional of the APMP. A certified PRINCE2 Practitioner; he has introduced and applied formal methods in a wide range of business environments. David is widely in demand as a speaker and trainer and has delivered bid management and APMP accreditation classes in Europe, India, China, Asia and Africa, and North and South America. Educated at Newcastle University he joined British Telecommunications in 1970 and has had a long and successful career in international business development. Publications include: *The Hitch Hiker’s Guide to Bid Management and Managing Successful Proposals with PRINCE2.*

**11:30 a.m. – 1 p.m.**  
**Networking Lunch**

**1 p.m. – 2 p.m.**  
**The Proposal Whisperer: Training Sales and Subject Matter Experts and Rehabilitating Proposals Professionals**  
**B.J. Lownie, Strategic Proposals, LLC**

With a nod to the TV show “The Dog Whisperer”, BJ Lownie, a well-known and respected proposal professional and popular APMP conference presenter, along with his dog Jack, will present and demonstrate concepts and methods they use when training that a proposal team can apply to improve communications, become more creative, make work more enjoyable and have more fun!

Besides his 30+ years’ experience as a proposal professional, BJ also has 40+ years’ experience working with and training dogs. During this highly informative, interactive and engaging session, he and Jack will demonstrate how they train, learn commands and develop good behaviors.

Participants are sure to pick up tips and techniques that they can easily apply and which will improve how their team communicates and works together. Dog owners and their dogs will learn how to work better together, develop good behaviors and even learn a new trick or two.
BJ Lownie, the Founder and Principal Director of Strategic Proposals LLC, has 25 years’ experience working on proposals and delivering proposal training and consulting services. He has worked on 100’s of proposals and he is a recognized thought-leader within the proposal arena. To date, more than 10,000 participants have attended his workshops, seminars and presentations. He is founding member of APMP), is accredited at the Professional level and is an APMP elected Fellow.

BJ is a skilled presenter and a favorite at APMP conferences. He is the co-author of the popular proposal blog “The Proposal Guys” (www.theproposalguys.com). BJ is truly, as it says on his business card and website, “Passionate about Proposals.”

The Cost Volume is Key: Five Principles of a Winning Cost Proposal
Nate Conn, SM&A
Are you losing procurements due to cost proposals deemed as unrealistic or high-risk by the customer? Have you ever bid and won and not been able to execute the program properly? Have you ever bid a low price solution and lost? The Cost Volume is Key covers the five best practices and the most common pitfalls in creating a realistic and reasonable cost proposal from the Price-to-Win (PTW) all the way to the cost volume to help you increase your win rate.

The five core principles that will be discussed during this presentation include how to:

1. Conduct a Comprehensive PTW
2. Execute the Cost Estimate Early
3. Create Credible BOEs
4. Include a Winning Narrative
5. Maintain Compliance

Nate Conn, SM&A’s Cost and Price Solutions Lead has extensive experience in proposal leadership as a Proposal Manager and Cost Volume Lead, and Federal government acquisition in IT, aerospace & defense, and services markets. With years of success in capture and proposal leadership and an 85% win rate, SM&A leads you through efficient, effective and disciplined processes. Over the past 27 years, we’ve supported our clients in delivering more than 1,200 proposals resulting in contracts valued in excess of $340 billion.

Proposal Mystery: How’d He Do That? Proposal Automation Tricks and Free Tools
Mark White, Proposal Geeks
Take your Proposal Center to the next level with some easy automation tools. We will start off with an overview on how to create automated macros for your company. We will then cover an overview to customize the new Word Ribbons.
Then the MAGIC starts with learning some of the automation tools for proposals that will reduce the redundancies and increase efficiencies in your proposal center. Many common proposal-related tasks can be automated to save time, decrease errors, and improve quality. Some of the tasks we will cover are: developing tabs, finding acronyms, creating proposal schedules, fast and easy headers and footers, setting up master documents, easy table of contents, compliance matrices, figure lists, etc. We will give away six of our most popular tools. We will also provide many tips and techniques for some of the new features in Word and Excel that every proposal center can use.

**Mark White** has been in the Proposal Industry for over 18 years. He has helped many of his clients such as BAE, Boeing, CSC, DynCorp, L-3 and many others automate their proposal operations to increase quality and decrease the amount of time proposal development takes. He is a founder and co-owner of Proposal Geeks. Proposal Geeks helps their clients automate their proposal centers and offers RFP or ITB parsing services. He currently works for WorleyParsons as the Strategic Pursuit Support Manager helping develop the top main thrust proposals.

**True Confessions of An Executive Who Selected and Implemented a Proposal Management System**

**Dawn Jordan, Wyle**  
Candid talk and lessons learned from the person who selected, implemented, and currently runs the proposal content management system for a $1.1 billion government contractor. Attendees will get a behind-the-scenes look at the process from vetting vendors to publishing the first proposal, including:

- How we knew it was time to upgrade our proposal capabilities  
- How we determined which product was right for our organization  
- How we built buy-in  
- What was unexpected during development and implementation  
- What happened when we went live  
- What results we achieved  
- What we plan to refine going forward

**Dawn Jordan** is an expert in the areas of customer strategy and retention. She currently oversees the pipeline management and proposal development tools for Wyle, a $1.1 billion provider of specialized engineering, scientific and technical services to the federal government. In addition, she manages the company’s market research and knowledge center activities. Prior to joining Wyle, Dawn wrote for the Wall Street Journal and worked for Bank of America and the Walt Disney Company. She holds an MBA from the University of Southern California.
Using Technology to Reinforce Best Practices and Improve the Customer Experience

Brian Vass, Qvidian
Dan Williams, Fifth Third Bank
Proposal automation software has advanced from simple search engines to powerful web applications that make best practices “second nature” to team members. Rolling out a proposal automation application is easy – but implementing processes to drive adoption and help users win takes a strategic game plan.

Hear real-world examples of how Fifth Third Bank successfully implemented proposal automation software to a 300-person team throughout the bank. Learn how Fifth Third created a Commercial Customer Experience Program to capture customer feedback after winning or losing a bid. And learn how this program helps drive the right professional sales behaviors, and ultimately increases win rates.

Brian Vass is Vice President, Marketing for Qvidian. His team is responsible for driving demand and awareness for Qvidian’s product and services. He is passionate about cloud-computing applications that improve sales and marketing effectiveness. Brian holds a B.S. in Finance and Marketing from Miami University (Ohio).

Dan Williams is Vice President, Commercial Sales Resource Center for Fifth Third Bank. He is responsible for processes and tools that drive winning Fifth Third Bank Commercial proposals. Under Dan’s leadership, Fifth Third has increased its commercial win rates by 20% and successfully converted larger, more complex sales opportunities. He has an MBA from Xavier University.

1 p.m. – 4 p.m.  
Telling Your Story: Compliant and Compelling Proposal Themes That Win

Chris Simmons, Rainmakerz LLC
This is a 3-hour session.
Winning is all about standing out among the competition and capturing the attention of proposal evaluators. Strong targeted proposal themes can make the difference between winning and losing your next bid. In an increasingly competitive marketplace, proposal teams need a more structured approach to writing proposal themes more efficiently and effectively. This session provides some proven methods, processes, and lessons learned to tell a more compliant and compelling proposal story using theme statements, focus boxes, and action captions. These proposal elements significantly improve proposal efficiency (getting it in) and increase proposal effectiveness (getting the win). Participants apply what they learned in a one-hour working sessions by developing a theme sentence and focus box from simple RFP and capture plan inputs using a
Chris Simmons is a highly acclaimed speaker and author on a wide variety of proposal and business development topics. He is a regular APMP and local chapter presenter and contributor to APMP publications, industry eZines, blogs, and websites. Chris has designed and delivered capture, proposal, and writing training for audiences of all sizes and levels of sophistication. He has a reputation for passionate, entertaining, and content-rich presentations that consistently score in the top percentile.

Chris is the ultimate rainmaker. He is the founder and principal of Rainmakerz Consulting (www.rainmakerz.biz) responsible for generating $69 billion in new business contracts for over 100 customers. Prior to Rainmakerz Consulting, he was a Director at Deloitte Consulting and a BD executive at CGI. He most recently served as Vice President of the APMP-NCA Chapter. Chris earned his MBA in Information Technology from the University of Massachusetts (Amherst) and was MBA program President.

Best of App Maven: PC/iPad Tools and Apps that Deliver on a Shoestring Budget

Beth Wingate, Lohfeld Consulting Group

This is a 3-hour session.

Proposal gurus fuse many specialized elements to develop winning proposals. Leverage AppMaven’s time and effort-reducing PC tools, iPad apps, and tricks to develop and manage your proposals more efficiently and effectively. This real-time demo presents the "best of" Beth’s 2010 and 2011 APMP Intl. and Regional Conferences demos of cost-effective PC/iPad tools & apps - plus new tools and apps - and provides reliable tips and advice on using them to increase your winning proposal capabilities. Many tools are inexpensive/free and useful for one-person to large proposal organizations (commercial and government) developing small to large proposals and task order responses. Lots of real-time Q&A and audience participation. Take home AppMaven’s handy checklist of software you can use every day to reduce the time it takes to do your job. Refine your proposal development and management capabilities using these tools and create proposal magic on a shoestring budget!

Beth Wingate, aka App Maven, APMP Fellow and member since 1996, is APMP’s 2012 COO. Beth was 2010-2011 APMP Director of Education, 2008-2009 APMP-NCA President, and APMP’s 2008 Chapter Chair of the Year. Managing Director at Lohfeld Consulting Group, she has 25 years’ experience managing, writing, illustrating, and producing winning proposals. She managed proposal development (pre-RFP - post-submission) for MSD and Lockheed Martin. Beth managed a proposal center and trained/mentored proposal and BD staff in industry best practices. She presented at APMP’s 2008-2011 Intl. Conferences;
**APMP-NCA’s 2008 Proposal Basics Boot Camp, 2010 Annual Conference; 2010 and 2011 APMP Pacific Northwest, APMP Nor’easters, APMP Georgia Chattahoochee/Carolina/Florida Sunshine chapters’ SPAC Fall Symposia; and APMP chapters virtual meetings worldwide. Beth develops and teaches proposal development classes through Lohfeld Consulting Group and Deltek. She regularly writes for APMP’s Journal and Perspective.**

**2:10 – 3:10 p.m.**

**Actually, There is an "I" in Team: Strategies for Successful Collaboration**

**Todd Packer, Main Sail**

Can you build your team to win? Proposal professionals and their teams can get caught up in the deadline focus of specific responses and lose team cohesion when it’s most critical, in the early stages before the next proposal begins. In this dynamic, interactive session, attendees will learn strategies for sustaining teams, and their leaders, beyond the individual proposal process, as well as expanding the idea of team to key partners beyond the organization. The presenters offer an “I4” model of collaboration – recognizing that teams need Infrastructure, Information, Inspiration and Instigation – to build a quality effort for Continuous Proposal Process Improvement. With a focus on agile, low-cost, flexible and innovative solutions, the presenters will demonstrate how seasoned commercial and public sector proposal professionals can leverage best practices to reduce stress, improve communications, spark ingenuity and deliver value to internal and external customers.

**Todd Packer** currently manages and develops the repeatable proposal development and win process for Main Sail, a US Veteran owned ISO 9001:2008 certified firm based in Cleveland, Ohio, that helps organizations evaluate business issues and develop and implement solutions. Main Sail provides expertise in 5 major areas; Business Process Management, Program and Project Management, ERP, Systems Engineering and Integration, and Program Staffing.

**Avoid LMO, Write an Eye Watering Executive Summary**

**Jay Herther, BAE Systems**

“Like Many Others” (LMO) is a comment made by many proposal evaluators. This brief shows how to be remarkable and truly stand-out. In this entertaining session, with some amusing videos and stories, you will learn how to write killer executive summaries. As you navigate the rough seas of business winning, it’s important to have a blueprint on how to write a winning executive summary. We cover the Who, What, When, Why and How and share the “Good, the Bad, and the Ugly”. We use a College Admissions evaluation analogy and exercise. (So, this session is also valuable for getting your high school student into the college of their choice!)

**Jay Herther** is the Director of Business Winning for the Electronics Systems Sector at BAE Systems. He has >20 years’ experience leading capture/proposal
teams to achieve a 75% win rate totaling over $10 Billion. Author of 12 APMP articles and he has presented dozens of Capture/Proposal briefings.

Jay has two Masters’ degrees from MIT and attended an Executive Harvard Business School program. Jay is a certified APMP Professional/Practitioner. He was recognized with the APMP “Insight Award” in 2007 and an APMP Fellow award in 2009. He is a lifelong learner, mentor, trainer and practitioner with a burning passion for winning business.

Managing Proposal Content: Challenges, Advantages, Strategies
Bina Goleminva, SAP America, Inc.

In our line of work, having "ready to use" or "boilerplate" content available at our finger tips is almost always a must. With this necessity, however, also come many challenges and questions: is the content good enough? Is it up-to-date? Is it consumable? Is it really "ready to use?" We have all struggled with the challenges of content management. When so much of our work is driven by content, having the right content management processes and tools in place is critical. The purpose of this presentation is to share and discuss the content management best practices we've developed in our organization, as well as some of the lessons we've learned along the way. The presentation will share our ideas and thoughts on what content and managing content really means. It will also explain the nuances of content management – ranging from brand compliance, through localization, to translation, and will suggest different strategies and approaches to managing content effectively.

Bina Goleminova is a Proposal Manager at SAP America, Inc., where she has held different proposal management roles since 2006. She is now part of the Global Proposal Management team at SAP, responsible for standardizing and organizing proposal management at SAP globally. (SAP has more than 50,000 employees and is present in nearly every geographic region of the world.) As a PM professional, Bina takes a strong interest in content development and maintenance, as a substantial part of the proposal process. She is originally from Bulgaria and has lived and worked in the United States since 2001. She is an MBA graduate of Drexel University in Philadelphia, PA.

New World "IDIQ" Captures and Proposals
James Smith, CACI

Recent trends in Federal Government Acquisition point to increasing number of multiple award IDIQ procurements. The Federal Government sees this as a way of increasing competition and doing more with less. It's a new world of 10-15 awards, teams with 100 subcontractors, and 2-year capture timelines. This presentation will examine how multiple award IDIQs fundamentally change the Capture and ultimately the Proposal process. IDIQs necessitate constructing a different capture/proposal timeline and B&P budgets. We will take a close look at how IDIQ's have unique capture requirements for customer data
gathering, subcontractor/teaming strategy, solution development, upcoming task orders, and pricing. Specifically, we will reconstruct the typical IDIQ specifications for broad sample task responses their implications.

James Smith has worked for over 30 years with firms who sell to the Federal Government and to Fortune 50 Companies; including Northrop Grumman, SAP, and currently CACI. Experience includes business development; capture, proposal and strategic account management. He has consulted to high-tech and large consulting firms in strategic account development and teaming. Mr. Smith is a member of APMP, past State President of STC, SAMA, AFCEA, AUSA, and the Association for Strategic Alliances. Mr. Smith has a BA in Economics and a MA in Organizational Communication. Mr. Smith has served as Adjunct Professor, Johns Hopkins Graduate Program.

3:10 – 3:40 p.m.  Afternoon Break, Refreshments

3:40 – 4:40 p.m.  Centralization of Proposal Management
Hüseyin Özkan, Nokia Siemens Network
Wolfram Seyring, Nokia Siemens Network
This topic is dealing with the design of proposal organizations. First part will give a framework for decision criteria to select the appropriate proposal organization design for a company. (30 minutes) The second part will focus on a case study of Nokia Siemens Networks. This gives insight to an implementation of a global proposal center. It is a unique implementation in size and geographical reach in telecommunications industry. (30 min) It will be a shared presentation by Nokia Siemens Networks and BidBox GmbH Germany.

Hüseyin Özkan is head of Global Bid Management Practices at Nokia Siemens Networks. He is also co-founder and Managing Director of BidBox GmbH, a private consulting and training company, which was registered in Düsseldorf - Germany in 2011. Educated at the Technical University of Hannover, Hüseyin started his career in research and development for wireless data communication. He joined AEG Mobile Networks in 1991 as Project Manager mainly for government projects. He has since 1998 worked for Siemens AG as Sales Manager and Bid Manager for key accounts. Having specialized in managing complex bids he later headed Bid Management Operations for Siemens Mobile Europe. After the merger of Siemens Mobile with Nokia Networks in 2007, Hüseyin supported the establishment of the first global bid centre for Nokia Siemens Networks in New Delhi/Gurgaon, India. Today he is member of the management team of the Centralized Sales Support Centre (CSSC). He is an APMP member since 2007 and supports actively operations of APMP DACH chapter.

Wolfram Seyring is founder of BidBox GmbH, which was registered 2011 in Düsseldorf, Germany. His experience in the field of proposal management he
gained while working with companies like Bosch, Ericsson, Nokia and Nokia Siemens Networks and other smaller German companies. He is member of APMP since 2002 and co-founder of APMP DACH, which was established 2007. He developed Processes, Training, Bid Material and Organizational designs for a common distributed Bid Management of Nokia Networks. From 2008 to 2011 he was in New Delhi/Gurgaon, India, where he established the first Centralized Sales Support Center for Nokia Siemens Networks. This center prepares proposals for the global organization of NSN. From mid-2011 he has a leading role in the company restructuring of NSN in Germany, where he is holding the position of Head of Operational Efficiency and oneLM.

**Going International: Bidding Beyond Borders**

**Ed Alexander, Shipley Associates, Moderator**

This session is a panel of Shipley personnel that represent Shipley’s international reach. Ed Alexander, PPF, APMP, VP of Shipley Associates, will chair the panel. Panel members will be Shipley Affiliate from the United Kingdom, Denmark, Asia Pacific, Korea, Canada, and perhaps Japan. Affiliate representatives will give a brief summary of the bid and proposal landscape of their footprint and then be open to questions from the audience. Topics of interest may include: Maturity of early capture and sales efforts; Proposal Scoring; How customers buy; Who prepares proposals; Mostly stated requirements vs. hidden agendas; Buying decision: group versus individuals; Interpretation of compliance and responsiveness; Customer focused versus relationship focused; Administrative/Logistic Challenges such as translation, production, etc. Potential attendees would include anyone with questions on international bid and proposal concerns.

**Ed Alexander, Moderator** – Elected an APMP Fellow for his superb contributions to the art and science of proposal development and known for his expertise in Business Development processes, Ed Alexander is considered one of the industry’s most knowledgeable consultants in the areas of long-term positioning, opportunity assessment, win strategy development, and capture/proposal management. As one of Shipley’s preeminent leaders, Ed is a dynamic, seasoned platform professional certified to provide consulting in all of Shipley’s focus areas: training, capture/proposal consulting, and process. He has taught more than 1,000 workshops and 20,000 participants in 20 countries. Ed has authored/co-authored many of the Shipley courses and personally certifies every candidate wanting to become a Shipley instructor. Ed was the first in the United States to be certified as an APMP Proposal Professional and has presented at many previous APMP conferences.

**Phil Cohen**—Panelist: Phil Cohen, Director, Shipley Asia Pacific, has been running Shipley’s Asia Pacific office in Sydney, Australia since 2003 when it was first set up. His 30-year career includes engineering, IT, professional services, recruitment, journalism and PR, sales and BD. Under Phil’s management,
Shipley has supported over $30Bn in bids in the past three years in Australia alone, with a better than 82% win rate. Industries supported in Apac include defence, engineering, IT and facilities management. Phil’s role has also included setting up Shipley’s offices in Korea, New Zealand, Japan and China.

Ross Betts—Panelist: Ross Betts, PEng, is a military academy graduate, a former fighter pilot in the Canadian Air Force and a former diplomat at the Canadian Embassy in Washington DC. He has worked both sides of the solicitation/proposal equation, on the customer side as head buyer for the Canadian Air Force for a four-year period in the 1990s and on the bidder side as Director of Business Development for Bombardier Aerospace. He led all business development efforts for a Canadian management consulting company for eight years in the early 2000s and has headed Shipley Canada since its inception in 2008.

Use Personality Profiling to Expand Your Proposal Circle of Influence
Sandra Foreman, Strategic Proposals

During the course of the proposal response process, how many people do you interact with? 1, 2, 10? Best practice assumes personnel from sales, marketing, engineering, legal and finance are all involved; but involved doesn’t always mean responsive. This presentation will remind the audience of how to work best with different personalities and motivate them to be more than just involved: to provide the critical information needed to produce a high-quality, high-impact proposal on-time and on-budget. The audience will also quickly recognize how their Proposal Circle of Influence will expand, as they successfully utilize the skills taught in this presentation. With every personality won over, you gain one more ally in the fight for a not just a good, but exceptional response!

The Death of Death by PowerPoint
Bruce Farrell, Plante & Moran, Technology Consulting & Solutions

Every day, countless professionals are tasked with converting their ideas into slide form in order to present them to a group. Unfortunately, most of those same professionals have little if any design training. The result is Death by PowerPoint. A world where an hour of scrolling through bulleted lists—often sprinkled with a few horrible graphics—has become the widely accepted standard. It is my goal to help non-designers, a) design clean and engaging presentations, and b) become advocates for good presentation design. We will discuss the problem and work with some basic design principles that will help you raise the bar. We will focus on common problems and offer practical solutions that you can use every time you develop a presentation.

Bruce Farrell is a Proposal Specialist for the Technology Consulting group of Plante & Moran. He has been working in business development for almost 20
years, focusing on all manner of internal and external business communications. Bruce’s specialty is helping staff identify and organize their key points and working with them to translate their “big ideas” into quality documents and presentations. He regularly works with pursuit teams, conference presenters, and keynote speakers to develop presentations that make an impact.

Real Live Chat Room
Q&A with Commercial Proposal Industry Titans
Matt King, Shipley Associates, Moderator

Thursday, May 24, 2012

7 a.m. – 4 p.m.  Registration, Breakfast

8:15 a.m. – 8:30 a.m.  Conference Opening
Jim Hiles, Bid & Proposal Con Co-chair, Emcee
Amy McGeady, APMP Chief Executive Officer
Rick Harris, APMP Executive Director

8:30 a.m. – 9:30 a.m.  Keynote
Lone Star Ballroom
Keynote Address
Put Away the Lawnmower, Charlie, Those Are Trees Out There!
Vicki Hitzge, CSP
Former television news anchor Vicki Hitzges has been inspiring those around her all her life. Personally trained by master speaker Zig Ziglar, Ms. Hitzges has spoken around the world for clients like the Ford Motor Company, MetLife, the American Red Cross, Wells Fargo Bank and the U.S. Department of Defense. Using a perfect blend of humor and practical advice, with a jolt of inspiration, APMP attendees will rise and shine with Vicki Hitzges long after her talk has concluded. This keynote delivers tips you can use immediately to attract and keep clients, close sales, and build strong relationships — in person and on the phone. Get ready to learn specific rapport-building techniques that will benefit you personally and professionally.

9:30 a.m. – 10 a.m.  Morning Networking Break, Refreshments

10 a.m. – 11:30 a.m.  Whose Proposal Is it Anyway? IMPROVing the Proposal Team
B.J. Lownie, Strategic Proposals

Improve communications, develop cooperation and spontaneity, foster creativity and have fun!

With a nod to the popular TV show “Whose Line Is It Anyway” and drawing on the exercises presented in the book, “Playing Along” (I. Gesell, Amazon), this session presents activities drawn from improvisational theater that can be used by a proposal team to develop communication skills and team-building. During
this informative, engaging and highly interactive session participants will be introduced to several improv games and have an opportunity to participate in them and develop acceptance, spontaneity, creativity and cooperation.

Presented by BJ Lownie, a well-known and respected proposal professional with 30+ years’ experience and a background in comedy and Improv, this session is sure to be a fun and laugh filled session that is the talk of the conference and one you definitely want to attend.

**BJ Lownie**, the Founder and Principal Director of Strategic Proposals LLC, has 25 years’ experience working on proposals and delivering proposal training and consulting services. He has worked on 100’s of proposals and he is a recognized thought-leader within the proposal arena. To date, more than 10,000 participants have attended his workshops, seminars and presentations. He is founding member of APMP), is accredited at the Professional level and is an APMP elected Fellow.

BJ is a skilled presenter and a favorite at APMP conferences. He is the co-author of the popular proposal blog “The Proposal Guys” (www.theproposalguys.com). BJ is truly, as it says on his business card and website, “Passionate about Proposals.”

**Government/Cost Analysis Task Force: The 7 Habits of Highly Effective Proposal Cost Analysis**

**Dan Galorath, Galorath, Inc.**, Moderator, Task Force Lead  
**Monica Smith, U.S. Navy, NAVAIR 4.2.1 Cost Department**  
**Panelists: Jean Goolsby, Heather Johnson, Bruce Morton, Quentin Redman**

Cost analysis is a critical component of proposals and program execution, requiring input and interaction from every part of the organization. Organizations outside of the cost analysis organization need to know how to interact and what the challenges are, while cost analysis teams must find ways to avoid being outsiders. This presentation adapts Steven Covey’s 7 habits to cost analysis for proposers and customers in both commercial and federal procurements. The seven habits and their summary in a cost analysis context follow:

1. **Be Proactive**: Identify cost targets, meet conflicting goals  
2. **Begin With the End In Mind**: Key Costs and Requirements  
3. **Put First Things First**: Planning  
4. **Think Win/Win**: Negotiate so Costing/Pricing/Performance Yield Fair Return for Fixed Price. Low Bid is Lose/Lose; Optimize Alternatives with consideration of Cost as well as Requirements & Performance  
5. **Seek First to Understand, Then to be Understood**: Understand the needs of the proposal team and customers.  
6. **Synergize**: Combine resources with technology
7. **Sharpen the Saw: Improve processes, methods & tools; Training**

**Dan Galorath**, Moderator, has been involved with engineering, estimating and analysis for 40 years. Under his leadership Galorath Incorporated, the developed SEER® cost, schedule, risk applications, methods, and training for 1) software, 2) hardware, electronics & systems, 3) Information Technology, and 4) Manufacturing. Mr. Galorath was awarded the 2009 Society of Cost Estimation and Analysis (SCEA) Lifetime Achievement award for contributions to the industry; and the 2001 ISPA Freiman Award, lifetime achievement award. Mr. Galorath’s book “Software Sizing, Estimation, and Risk Management” was published March 2006. Mr. Galorath is chair of the APMP Cost Analysis Task Force.

**Monica A Smith**, NAVAIR 4.2.1 Cost Department, is the Source Selection Process Owner for the NAVAIR Cost Department (AIR-4.2). Since 2004, Ms. Smith led the cost team of an ACAT ID program through Milestone B, and served on the Source Selection Evaluation Board (SSEB). Since 1984, she has worked for The Boeing Company and PRICE Systems, LLC as Cost Volume Manager for proposals ranging from $100 Million to over $2 Billion, and served as Executive Consultant to both government and industry clients for cost analysis. Ms. Smith holds a MS in MIS from George Washington University and is a member of the APMP Cost Analysis Task Force.

**Jean Goolsby**, AM.APMP, is a Senior Consultant for Syndetics. She has 29 years design, technical, and proposal management experience in government and commercial product development and research. Prior to joining Syndetics, Inc., she formed and managed a Proposal and Publications Department for ITT Geospatial Systems (GS). In that role, she established a divisional proposal process, recruited a staff of proposal managers and publication specialists, and built successful proposal support relationships with GS business units. She led the development of an internal training curriculum for proposal management, proposal writing and presentation skills. Jean trained and mentored proposal managers, engineers, technicians and support personnel. She has been a member of the APMP Cost Task Force since 2009. Jean has an MS degree and a BS degree from Rochester Institute of Technology in Electrical Engineering.

**Heather Johnson**, a Proposal Manager for ITT Exelis Geospatial Systems Division, has 12 years’ experience working in private industry as a human resource specialist, recruiting manager, Parts, Material & Process Engineering specialist and technical writer. In addition to her current role as Proposal Manager Heather also manages technical presentations, white papers, and coaches presenters. She is holds her Foundation Level APMP accreditation.

**Bruce Morton** is an APMP Fellow and Sr. Associate, Strategic Capture & Proposal, at Booz Allen Hamilton. Prior positions include Sr. Capture Manager

**Quentin Redman** is Director – Solutions Architect for PRICE Systems, L.L.C. in California. Responsible for developing and providing cost information to support program managers, engineers, and IPD teams at various companies in making sound business, programmatic, and design decisions and for establishing cost goals through the evaluation of economic impacts associated with various concepts and analysis of alternatives. This includes Affordability, Design To Cost, Life Cycle Cost, Uncertainty, Risk Analysis, and Cost As Independent Variable. Retired in 2011 as a Sr. Engineer Fellow at Raytheon Company.

**The Electronic Proposal: A Demonstration of New Media Tools**

**Mitch Boretz, University of California at Riverside**

**Mike Parkinson, 24 Hour Company**

The proposal of the near future will be much more than ink on paper or PDF file on disk. It will have an interactive compliance matrix connected to sections of the proposal. It can have video, animations, and other features that can enhance communication and improve the procurement process. The APMP Electronic Proposal Task Force will demonstrate how the proposal of the near future might look, and some of the tools and skills that soon will be part of a proposal professional’s daily life. Also, we will build on our 2010-11 work by sharing input from the procurement community about their feelings on going paperless and their perspectives about how we will get from here to there.

**Mitch Boretz**, F.APMP, is the founding chair of the APMP Electronic Proposal Submission Task Force. The task force was established in 2010 to build consensus with our customers and vendors about how best to incorporate modern technologies, such as video and hyperlinks, into proposals. Mitch directs proposal operations for the Bourns College of Engineering at the University of California, Riverside, where almost all of 300+ proposals each year are submitted electronically. He is a member of the board of the APMP Southern California chapter. He has presented at three previous APMP conferences and contributed three articles to the APMP Journal.

**Mike Parkinson** (PPF.APMP) is an internationally recognized visual communication expert, award-winning author and APMP Fellow. As an owner of 24 Hour Company (24hrco.com - the premiere proposal graphics firm), Mike has spearheaded multi-billion dollar projects and created thousands of graphics resulting in billions of dollars in increased revenue for his clients. Using his 20
years’ experience, he authored the book Billion Dollar Graphics, which shows busy professionals how to turn their words and ideas into winning graphics. Contact him at mike@24hrco.com and visit BillionDollarGraphics.com and GetMyGraphic.com for more helpful proposal tools.

**Better Than a Template, Faster Than a Recycling Narrative**

**Carl Dickson, aCapturePlanning.com**

Templates and recycled proposal narratives do not save time, and for most proposals will do more harm than good. How often do your writers ask "Haven't we written about this somewhere before?" If you try to catalog and recycle your proposal narratives, it will consume a lot of resources and lower proposal quality instead of raising it. Planning the content of your proposal will help define the goals, but writers still crave inspiration for what to write about. Carl will show a new approach that provides the inspiration writers need and makes the writing easier, but is also safer to use and easier to maintain. It enables you to give your authors something to start from that helps them to figure out what say and how to say it.

**Carl Dickson**, founder of CapturePlanning.com, has authored dozens of publications to help people improve their business development and proposal efforts. His articles and tutorials have been read by millions of people worldwide, and over 66,000 people subscribe to his weekly newsletter. He is lead developer of the MustWin Process and recently launched a new tool called PropLIBRARY. Carl has helped companies win proposals for more than 20 years. He is also a past President of the APMP National Capital Area Chapter and has spoken at dozens of APMP events and conferences.

**Make Every Meeting Matter: Effective Interactions**

**Betsy Blakney, CACI**

**Jay Carroll, CACI**

Businesses are under constant pressure for productivity improvements. Conducting effective meetings goes beyond adhering to a set of guidelines, time management and proper planning. It involves working smarter. Every proposal-related meeting should provide clarity and closure for critical decisions in the form of tangible outcomes and assign accountability for each action item. Establishing accountability places responsibility on individuals, creates a deeper level of trust among team members and promotes effective interactions. Through this workshop, learn how to lead meetings that matter, deal with difficult people, make your meetings sizzle and incorporate best practices-aligned to APMP’s Accreditation Program-into solution sessions, kick-off meetings, daily stand-up meetings and out-briefs. Through a series of exercises, be confident that you can identify healthy vs. unhealthy conflict, keep unproductive behaviors under control, stick to an agenda and build unity toward agreed upon goals.
Betsy Blakney, PPF.APMP, is an APMP Fellow, Accreditation Mentor and a former APMP CEO, COO, Board Secretary and Regional Director who has led many APMP Board, Executive Committee and Regional Director meetings. She learned to “nurture the irritant into a pearl” as president of a Washington, DC metro non-profit organization. She honed her skills as the APMP-National Capital Area (NCA) President in 2003 and as NCA Secretary/Treasurer from 2001-2002. She also served as the 2010 International Conference Co-chair and on the APMP Journal staff as Assistant Editor and Books Editor. She presented at the 2011 and 2010 International Conferences, at SPAC’s 2011 Great Proposal Cook-off, and at APMP-NCA’s 2008 Professional Day. With 16 years of experience managing, writing, and producing winning proposals, she currently is a Senior Proposal Manager for CACI, INC.- FEDERAL and is proficient at running effective kick-off meetings, daily stand up meetings and engaging in one-on-one conversations with volunteers and various stakeholders resulting in meetings that get results and produce positive outcomes.

Jay Carroll, AM.APMP, has established and managed high performance teams through leading a wide range of Capture and Proposal Kick Offs, Solution Sessions, and Color Team Reviews in sessions that have included over 100 internal and external participants from as many as 30 active teammates. His Critical Success Factors in proposal meeting dynamics include developing trust, accountability and dependencies with a diverse group of Business Development, Capture, Line Subject Matter Experts, Consultants, contract teammates and proposal professionals. His expertise includes promoting growth and development initiatives through Marketing, Proposal Development, GWAC/DWAC/IDIQ contract program management and successful pursuit of new task order and strategic opportunities. Following a successful military career, Jay has 14 years of experience managing, writing, and producing winning proposals. He currently is a Senior Proposal Manager, Intelligence and Classified Proposals at CACI, INC.- FEDERAL.

11:30 a.m. – 1 p.m. Networking Lunch

1 p.m. – 2 p.m. Ya Gotta Be in the Ballpark to Play: Developing the Early Price To Win

Randy Richter, Richter & Company

Federal or commercial, domestic or international: understanding how competitors will develop and price solutions in response to customer requirements is key to a winning capture – and a clear best practice in today’s hyper-competitive marketplace. At its most effective, this analysis consists of two elements: development of the history-based, top down “Price To Compete” early in the capture lifecycle, and development of the opportunity-based, bottom-up “Price To Win” once detailed requirements and evaluation processes are known. This session describes a proven process for developing the top-down Price To Compete early in the opportunity lifecycle. Learn how early effort
enables effective gate reviews, simplifies solution design efforts, and makes development of winning pricing strategies possible.

**Randy Richter** is President of Richter & Company, a Frederick, Maryland based competitive analysis and pricing strategy firm. His knowledge and experience – combined with outstanding analytical and presentation skills and an overwhelming “can do” attitude – have helped clients win more than $30 Billion in business in the highly competitive Federal marketplace. He has been a featured speaker at Federal conferences, industry association events and technical meetings, including presentations at both the APMP International Conference and APMP National Capital Area Mid-Atlantic Proposal Conference in 2010 and 2011. Mr. Richter holds a B.S from Cornell University and an M.S. from the State University of New York at Cortland.

**Expand Your Influence & Heighten Your Personal Profile**

Robin Davis, Robin Davis Consulting  
Melissa DeMaio, Ernst & Young

Business development teams in the commercial space are challenged with more complex and global opportunities than ever before. In order to do your best work as a proposal practitioner, you require more information than what is provided in the RFP. The goal of this session is to introduce several concepts and tools to better integrate you and your team into the strategy development discussions and/or client interactions. There are several things you can do to change the perception of your role and differentiate where you can add additional value and “have a seat at the table” alongside your sales team. We'll cover topics such as relationship mapping, client decision makers/client coaches, and gathering client intelligence. Utilizing these tools/strategies will enable you to develop more customized proposals, host more meaningful kick-off meetings, and improve the organization’s perception of the value you provide to the team.

Robin Davis, AF.APMP is a proposal and sales operations consultant with more than 20 years’ sales experience. Robin helps clients win more business, faster, by building and implementing sales processes and tools that improve quality and efficiency. Robin specializes in strategic sales communications (e.g., proposals) and custom design and implementation of tools that support sales (e.g., Salesforce.com). Robin is an APMP Fellow, leads the APMP’s Healthcare Industry Task Force, and is a frequent speaker at APMP international and SPAC conferences.

Melissa DeMaio, APM.APMP has served as a senior Communications & Pursuit Strategist in Ernst & Young’s Financial Services Office for close to eight years. She currently leads the firm’s Financial Services Office proposal team and manages other proposal specialists across five cities including New York, Atlanta, Boston, Chicago and San Francisco. She has been managing proposals
and other pursuit-related/relationship building material in the commercial sector for more than 12 years. Melissa also serves as Co-Chair and Co-Program Chair of APMP’s NY Metro Area Chapter. Before beginning her career in business development, Melissa worked at various television production departments such as Viacom/VH1 and The Maurey Povich Show. She earned a Bachelors of Arts in Communication Arts as well as a Masters of Arts in Communication Studies/Organizational Management at Montclair State University in Upper Montclair, NJ.

Effective Communication for Dynamic Proposal Team Building
Robert Goransson, Ericsson Inc.
A proposal team is a temporary project team put together for the purpose of creating a proposal, and the strength of the Team is important. Proposal managers are responsible for the spirit of the team and can greatly affect the outcome of the process, as a result of communication with the team. This presentation explores how we trigger the right and wrong responses from team members, how we make the team stronger and how we may break the team down. We will discuss the high stress, deadline driven scenarios of the proposal world: what to do when things are heating up and finger pointing starts, how to be sensitive to what is happening in the team, and how to anticipate and avert problems before they happen. Effective Communication for Proposal Team Building teaches the finer points beyond the mechanics of Proposal Management.

Robert Goransson has worked in the Telecommunications industry for 30+ years. He has served as Manager and Director in the Technical Assistance Center in addition to Director and VP over Support, Training and Quality departments. He also worked as a Services Sales Director. During the last 10 years he has studied Communications, Sales Techniques, NLP, Hypnosis, Influence, and Management. He is a Certified "Proposing to Win" Trainer, and is Peak Potentials Certified Trained. Robert has 8+ years working as a Proposal and Bid Manager.

I'm On My Own and I Am Expected To Do It All
Tony Birch, Shipley Limited
Doing the “impossible for the ungrateful” is the motto that most individual proposal managers, in SMEs, and divisions of large organizations, have to live by. Often, they are a sole resource, working on multiple concurrent bids, with little support from others. This talk will explain how a reasonable work-life balance can be regained through the deployment of efficient proposal management processes, effective tools and appropriate reviews. After this talk, individuals will be confident that they can apply professionally accepted standards and practices on proposals of all sizes and complexities. The talk will
cover applying these techniques to both formal and informal proposals including Q&A formats, such as RFIs.

Tony Birch is the founder and Managing Director of Shipley Limited, in the UK. Elected a Fellow in 2006, Tony served on the main board of the APMP for 4 years. He currently serves on the board of the BDII (Business Development Institute, International). A fully accredited Proposal Professional, under the APMP Accreditation Programme, Tony’s background is in Sales in the Defence & IT Sectors. Since founding Shipley, Tony has trained over 10,000 sales and bid professionals around the world. Tony works with companies across sectors as diverse as Automotive, Construction, Defence, Finance, Information Management, Insurance, IT Services and Telecoms.

Proposal Mystery: Affecting Proposal Outcomes Through Content and Leadership

Olessia Smotrova-Taylor, OST Global Solutions

What separates outstanding proposal managers from mediocre ones is the ability to lead their teams in developing winning content on top of running a smooth process. No matter how compliant and attractive the document may be, most often it is the substance that will distinguish a winning proposal from the rest. Evaluators can see through the fluff.

Many proposal managers rely on subject matter experts (SME) to create the substance, but most SMEs require guidance, facilitation, and significant rewrites in order to produce something innovative and compelling. Rarely is a proposal team blessed with a solution architect who can guide the SMEs. Proposal managers with high win rates become solution architects themselves to ensure that their proposal content shines.

But how to become an expert in a new subject in a matter of days? How to coax winning CONOPS out of subject matter experts? How to master the art of an interview and other content generation methods? What are the tricks to get the most from your proposal team in the shortest possible time? And, how to tell good content from poor content?

This session covers the steps with the exact how-to techniques to help proposal managers take charge of influencing proposal outcomes to a much greater degree. It also covers key success ingredients for becoming a proposal ace.

Olessia Smotrova-Taylor leads OST Global Solutions (ostglobalsolutions.com), a Maryland company specialized in business development, capture, and proposal consulting and training. She is a recognized thought leader in the global business development community. She is the President of the APMP National Capital Area (NCA) chapter. She regularly presents at the APMP’s international and other conferences, webinars, roundtables, and the NCA Proposal Boot Camp. She also
teaches a graduate course in proposal development at the Stevens Institute of Technology. She led winning bids for four out of five top government contractors, and numerous mid-size and small businesses, winning more than $18 billion over the course of her career. Prior to OST, she worked at Raytheon, Lockheed Martin, and the Financial Times of London.

We Met on Match.com, But You Don’t Look Like Your Picture
Nancy Kessler, Shipley Associates
With all the talk in our business about proposing and engaging, you’d think we were an extremely romantic bunch, but what we really are is matchmakers. Bidders look for just the right resource. Buyers look for just the right bidder. Consultants look for the right customer and vice versa. It is all about the relationship, but how that begins has a lot to do with how well it goes. First impressions are critical when a consulting engagement begins. How the consultant comports him or herself, how professional their appearance is, whether they have an understanding of their customer’s opportunity and company, all set the tone for the initial meeting. But there are other first impressions in play as well. This session will show buyers of consulting services how to maximize the return on their consulting investment. It will show consultants how to “rise above” the poorly-staged engagement. And it will help proposal professionals understand how to get the most from an engagement.

Nancy Kessler is VP, Consulting Operations at Shipley & Associates. She was named APMP Fellow in the class of 2004 and accredited at the Professional Level in 2006. She has presented at numerous International conferences, NCA Chapter Meetings and Boot Camp. As a capture and proposal professional she has been both the consultant and the customer, bringing both perspectives to this topic.

1 p.m. – 4 p.m.

Government Task Force, Developing Evaluation Criteria

Dan Fulmer, ASC/AE
Alan Goldberg, Naval Air Systems Command HQ
Kristin Dufrene, CACI
This is a 3-hour session.

Two experts from the government sector will lead a discussion on how Evaluation Criteria are developed. In this presentation, you will learn about best value, the specifics and format of a Request for Proposal, how source selection is organized, the ins and outs of ratings and their descriptions, the strange and mysterious interplay between Sections L and M (including technical vs. risk scores, past performance, and cost vs. price) – specifically, how these two important sections are developed and used in an RFP. Representatives from the industry will also be on hand to help answer questions during the presentation. Whether you are a senior proposal manager or new to the industry, this presentation will show you the inner workings of how a federal agency develops their evaluation criteria for an RFP and how it is used to score
your proposal. The presentation is part of a training program used by the U.S. Air Force in their Acquisition Center of Excellence.

**Dan Fulmer**, ASC/AE, has 31 years of government acquisition experience, buying spares, research & development, sub-systems and major systems for both the Defense Logistics Agency as well as the Air Force over that time. Since 1995 Dan has been instrumental in developing and updating several iterations of the Air Force source selection procedures. He is currently the Chief of the Source Selection Branch within the Acquisition Center of Excellence at the Aeronautical Systems Center (ASC) at Wright-Patterson AFB. In this capacity he leads a multi-disciplined team that facilitates the development of acquisition strategies and solicitations for all competitive acquisition category (ACAT) programs within the myriad Program Executive Officer (PEO) portfolios for aircraft, trainers, sensors, and their support acquired at ASC. Then, after RFP release, Dan’s team provides training and advice to the evaluation teams as they execute the source selection process. This is Mr. Fulmer’s 12th consecutive year participating as either a presenter or panel member at the conference.

**Alan Goldberg**, Naval Air Systems Command HQ, is the Source Selection Office Director of the Naval Air Systems Command (NAVAIR). He has been in the engineering and acquisition fields with NAVAIR since January 1977, coming to the Source Selection Office in 1991 and becoming the Director in 2000. He is a graduate of the Senior Executive Management Development Program and is a member of the Acquisition Professional Community with DAWIA Level III certification in (1) Systems Planning, Research, Development and Engineering, (2) Program Management, and (3) Manufacturing, Production, and QA. Through Mr. Goldberg’s efforts in the area of competitive procurements he has earned several accolades, including APMP’s Fellows Award, Department of Navy Meritorious Civilian Service, Office of the Secretary of Defense Medal for Exceptional Civilian Service, and the Department of Navy Competition and Procurement Excellence Award for Outstanding Promotion of Innovation Individual Award Category.

**2:10 – 3:10 p.m.**

**Benchmarks in Price-To-Win and Competitive Analysis**

**Howard Nutt**, BD Institute International

This presentation discusses findings of the BD-Institute’s 2011 study, “Benchmarks in Price-to-Win and Competitive Analysis (PTW/CA) Capability in a Company.” It answers four key questions explored as part of the study: What is the current state-of-the-art in PTW/CA among leading practitioners today? How do leading companies maintain their winning capability? What are the key factors for successfully implementing PTW/CA capability in a company? How do industry leaders assure that pricing derived from PTW is executable in their resultant programs?
The discussion addresses essential practices, competencies, organizational approaches, methods, and tools & techniques for actually performing PTW/CA in a company. In addition, the presentation quantifies specific priorities and benefits associated with specific best practices studied during the research project. Audience members take home specific strategies and supporting data for establishing or improving their companies’ PTW/CA operation.

Howard Nutt has been a business development (BD) professional for more than 30 years and is currently Executive Director of the BD-Institute International, a non-profit corporation dedicated to BD excellence through the Capability Maturity Model® for Business Development (BD-CMM) and continuing research and development on BD best practices. Howard helped organize and is a charter member and fellow of the Association of Proposal Management Professionals (APMP), and he has worked with both large and small corporations in the USA, Canada, Mexico, Europe, India, and the Asia Pacific.

How To Make Your Ideas Stick In Proposals
Jayme Sokolow, The Development Source, Inc.
How do you make your ideas stick in your proposals? In 2007, Chip and Dan Heath published Made to Stick: Why Some Ideas Survive and Others Die. This influential book argued that sticky ideas usually are simple, unexpected, concrete, credible, and emotional, and they often are communicated in the form of stories. This session will apply the Heaths’ ideas to proposal development. By the end of the session, you will learn how to create sticky ideas for your proposals, primarily through interactive exercises.

Jayme A. Sokolow is President of The Development Source, Inc. a Washington, DC metropolitan area company that helps businesses and other organizations develop proposals, primarily to government agencies. Over the last decade, The Development Source has been involved in proposal efforts of over $50 billion. He is the Assistant Managing Editor and Chair of the Editorial Advisory Board of Proposal Management and has received APMP’s Vision Award and Fellows Award.

Making SharePoint Work for Proposals, No Really!
Marc Lieber, Proficient Technologies
Pat Esposito, Proficient Technologies
Many organizations use SharePoint as a document management and collaboration tool, yet only a few organizations have invested in fine-tuning SharePoint to meet the specific demands of proposals. This workshop provides ready-to-use tools and techniques for transforming rudimentary SharePoint into a time-saving tool. Techniques shown are based on experiences of several leading proposal organizations. We present the top "bang for the buck" configurations that save significant time for a small effort and low cost. We also present more advanced configurations that can be implemented via "do-it-
yourself” or purchasing specialty commercial SharePoint products. Special attention will be devoted to management of graphics. This will be a demonstration with step-by-step instructions provided to participants.

**Marc Lieber** is President of ProFicient Technologies (Rockville, MD), provider of proposal and project management and IT solutions. He served as the corporate level executive proposal lead and senior level proposal and capture manager for government contractors on hundreds of procurements. Mr. Lieber has served as a management consultant for US Government agencies, law firms, hedge funds, and start-ups. He served for 10 years as a project manager consultant to the American Red Cross Biomedical organization, leading projects using information technology to enhance the safety of the US blood supply. He participated in the New York City and Washington DC SharePoint user groups. Marc received his bachelors and masters degrees from the University of California, Berkeley. He holds the PMP certification from the Project Management Institute and the Master-level certificate in Enterprise Content Management from AIIM. He is a member of the APMP National Capital Area.

**Pat Esposito** is President of IMPACT Management (Hicksville/Long Island, NY), a leading provider of Microsoft SharePoint and other technology solutions for workflow, business automation, business processes, business intelligence, and portals. IMPACT Management offers SharePoint solutions, including applications for healthcare, education and commercial customers including ADP, Goldman Sachs, Chase, Prudential, and New York Telephone (Verizon). Under Pat’s leadership, IMPACT Management attained the elite Microsoft Gold Certified Partnership in 2003. Pat was a Demonstration Showcase Presenter at the 2006 Microsoft World Partner Conference. Pat’s career began as an electrical engineer for Olivetti Corporation and advanced into software development with a concentration on micro-technology and communications. Pat was a founding member of the Cheyenne Software and Multex organizations. Pat is a member of the SetFocus Advisory Board and Long Island Software and Technology Network (LISTnet) Microsoft Technologies in Government Committee. Pat contributes to TechIQ magazine. Pat has a BS in Computer Science and a minor in Marketing from the New York Institute of Technology.

**Establishing a Commercial Proposal Program: Creating and Proving Your Value Proposition**

**John Doodokyan, Sales Operations**

Your commercial company is on a fast track growth rate, and your sales people have been doing their own proposals for years. Why change? Commercial companies will often reach that critical stage where a formal proposal program is not just needed - it is required! This presentation will present step by step the selling message to upper management to establish a proposal program, establish a foundation, and then provide the value proposition to justify the funding. The presenter will give a first-hand account.
of his experiences and lessons learned in establishing a global proposal program for a commercial Fortune 500 company.

*John Doodokyan* has a well-rounded level of experience in proposal management having over 30 years of experience in both commercial and federal proposal capture management. John’s responsibilities have spanned large scale proposal efforts; and opportunity capture strategy development for billions of dollars in contracts.

John is a Proposal Program Manager at NetApp, prior to NetApp, John was a Proposal Manager at Hewlett-Packard (HP) for over 20 years, and prior to HP, John worked in the aerospace industry. John has previously presented at APMP’s 2007, 2008, and 2009 International Conferences. John holds a MBA from Santa Clara University.

**Real Live Chat Room**

Q&A with Federal Proposal Industry Titans

Matt King, Shipley Associates, Moderator

3:10 – 3:40 p.m.  
Afternoon Break and Refreshments

3:40 – 4:40 p.m.  
Getting Strategy Into the Proposal

Gerald Gutierrez, SM&A

We all know that getting strategy into the proposal is a fundamental key to winning. But what do we mean when we say strategy? What is an effective strategy? What is the role of Capture/Campaign Manager vs. Proposal Manager? How is an effective win strategy developed? What are the key elements? And most importantly....How do you ensure it is executed effectively and incorporated into the proposal? These are the topics addressed in this session with emphasis on real actionable takeaways to improve your win rate. Concepts include: - Customer analysis - Competitive Analysis - Understanding, developing and leveraging discriminators - Identifying and eliminating barriers to winning - Offer and value proposition development - Strategy development - Effective messaging and substantiation.

*Gerald Gutierrez* is Vice President of Proposal Leadership for SM&A and is responsible for over 40 proposals nationwide, representing over $10B in total potential contract value to SM&A’s client. Since joining SM&A in 2007, Gerald has achieved a mean 70% and weighted 89% win rate on proposals ranging from $10M to $700M to the US Postal Service, US Department of Homeland Security, US National Security Agency, the United Nations, Starwood Hotels, the Greater Toronto Airports Authority, the Commonwealth of Pennsylvania, the State of Maryland, and the City of New York. Gerald began his career at Boeing as an IT Project Manager and moved into roles including Chief of Staff to the VP of Boeing Satellite Systems. Before joining SM&A, Gerald became involved in Boeing’s satellite proposals, working on proposals worth up to $14B in contract value. Gerald holds a BA with Honors from the University of California at Berkeley, and an MBA from the UCLA Anderson School of Management, where
he was named Fellow of the Global Access Program and has served as a judge for start-up business plans.

Getting What You Need From Your Subs, Partners, Teammates, Consultants and Contingent Hires
Neil Evans, Morgan Franklin
Many proposals require us to partner with others to build a winning solution. Proposal managers must get quality work from third parties - their job is to manage these relationships to success. In this interactive session we will work through three recent, real-world case studies:

1. JV consisting of prime plus 2 others. Each is critical to the solution. One of the JV partners proved to be a disruptive problem child.
2. Prime partnered with small firm who brought incumbency on the work we wanted, but little availability.
3. Prime reliant on SME for both technical insight and solution design in a complex proposal for a new client and offering.

With each example, we will discuss the case study, ending with a problem statement. Groups will work together, and then propose a possible solution to the problem. I will provide the story of what actually happened and recap best suggestions. The aim is for us to generate a set of usable solutions and conclude with actionable takeaways.

Neil Evans brings more than 11 years of proposal management experience, winning proposals from short turn-around task orders to large federal, state & local IDIQs and full & open procurements, in organizations of all sizes and maturity levels. Mr. Evans has managed winning proposals across multiple customers, including a wide range of DoD agencies and components, the Intelligence Community, and civilian agencies. The majority of these proposal efforts have relied upon inputs from teams of contributors, all who bring their own challenges and idiosyncrasies.

When Models and Cultures Collide: Why You Must Be an Effective Influencer
Keith Wallace, Wyle
Need higher throughput from your proposal shop? Pressure to increase your throughput straining limited resources? Sense you could meet such demands if you had the tools and techniques to make things happen? Does your company’s culture have room for them? If you answered ‘yes’ to any of these questions, then “When Models and Cultures Collide…” could provide you with insights on how to facilitate the necessary improvements. The Business Development Capability Maturity Model (BD-CMMÔ) offers a great framework for improvement; however, how well does it integrate with your company’s culture? Will it represent a ‘bridge too far’- the failed attempt to capture several
bridges to Germany in World War II in a campaign called Operation Market-Garden? Or is there a way to ‘crack the code’ and experience breakthroughs in your proposal processes? This presentation discusses thoughts and a case study showing how it is possible to successfully integrate models and cultures to meet increasing demands.

Keith Wallace is the Senior Proposal Manager for Wyle’s highly productive Aerospace Group Proposal Development Support Center (PDSC), and is responsible for capture and proposal operations processes: facilitating capture management, engineering solution designs, and managing active proposals. Mr. Wallace earned a BS Degree in Electrical Engineering from Old Dominion University in 1983 and specialized in military and commercial air vehicle telemetry and navigation programs. He has published technical papers for the International Telemetering and Institute of Navigation/Global Positioning System Conferences on closed-loop telemetry and GPS integration programs and was certified by Shipley in 1994 to conduct proposal writing workshops for employees in various Wyle divisions. He transitioned into Wyle’s Aerospace Group PDSC in 2007, and is an Accredited Professional Practitioner Member of the Association of Proposal Management Professionals (PPM.APMP).

The Millennials Are Coming!
Brad Douglas, Shipley & Associates
Ready or not, a new generation has entered the workforce - “The Millennials!” The Millennials (the Y generation, people born between 1978 and 1996), make up over 25 percent of the workforce. They are trying to fit in with the existing workforce and make their mark in the business development industry. The capture and proposal development profession is experiencing a transition. The workforce is moving from aging gray-beards to a high-energy, young workforce with new motivations and expectations. Social media, gaming, messaging, “remote officing,” flex scheduling, cloud computing, and other trends affect the way we manage and prepare proposals. One study indicates more than 60 percent of employers are experiencing tension between employees from different generations - “more than 70 percent of older employees are dismissive of younger workers’ abilities.” Receive practical insights into managing, collaborating, and working with Millennials. Some leaders may want to trivialize this important workforce issue; yet it will re-shape the way we all work!

Brad Douglas, Chief Operating Officer/VP Marketing, Shipley Associates, is a proven business development leader with over 30 years of experience in marketing, business development, sales, and executive leadership. He has helped many companies compete for and win strategic contracts, has built e-marketing systems and pursuit campaigns from scratch and led strategic sales and marketing initiatives that have consistently increased revenue and profitability.
Mr. Douglas has managed field sales organizations of over 180 account executives in 12 regions, managed an inside sales and business development team of 40 business developers, and has maintained complete profit and loss responsibility. His expertise is in directing sales and marketing strategies for services firms, requiring consultative selling techniques and creative sales and capture approaches. He holds a Masters Degree in Human Relations and Organizational Development.

How to Lie with Charts
Gerald Jones, Mission Critical Technologies, Inc.
Learn to quickly spot misleading information in visual presentations. Based on the popular book "How to Lie with Charts" by Gerald Everett Jones. Decompose examples of good and bad visual presentation practices. The main focus is the principles of persuasive - and undistorted - visual communication. It's about careful thinking and clear expression. If you're using a computer to generate charts for proposals, meetings, and reports, you don't have to be taught how to lie with charts - you're already doing it. You probably don't know your charts are unreliable, and neither does your audience. So you're getting away with it - until a manager or a sales prospect or an investor makes a bad decision based on your information. This material has been used as courseware at Empire State and Georgetown Public Policy Institute.

Gerald Everett Jones is Manager of Marketing Communications at Mission Critical Technologies, Inc., an IT and scientific engineering consulting firm. MCT's customers include government agencies (DARPA and NASA), healthcare organizations (UCLA and Novant), and commercial accounts (Warner Bros. and Toyota). He is the author of more than 25 business and technical books, including How to Lie with Charts and PMP Certification for Dummies, as well as two comic novels. He has an extensive background in IT systems development and was project leader on the ARTIS computer graphics system, a precursor of Harvard Graphics and PowerPoint.

6:30 p.m.  Bid & Proposal Con 2012 Awards Celebration
Lone Star Ballroom B
Celebrate the accomplishments of your industry colleagues, as they are recognized at the inaugural Bid & Proposal Con 2012 Awards Celebration. Join us for a reception and full sit-down dinner, and see who’s being recognized for Chapter Programs, Events, Practices, as new Fellows inductees and more! This is your chance to network the night away and celebrate your industry.


The dress code for this event is business casual.
Friday, May 25, 2012

7 a.m. – 12 p.m.  Registration, Breakfast

8:15 a.m. – 8:30 a.m.  Conference Opening
  Jim Hiles, Bid & Proposal Con Co-chair, Emcee
  Amy McGeady, APMP Chief Executive Officer
  Rick Harris, APMP Executive Director

8:30 a.m. – 9:30 a.m.  Keynote
  What It Took To Bring The Super Bowl To the Big D
  Tara Green
  Former Vice President and COO, North Texas Super Bowl XLV Host Committee
  Part presentation and part fireside chat, Tara Green, the bid manager and one of the pivotal reasons that Dallas was selected to host last year’s Super Bowl, joins APMP attendees for this inspiring Keynote address. Responsible for coordinating, writing and delivering the bid, for months Ms. Green was on the front line of the effort that landed the National Football League’s most coveted prize – the Super Bowl – to Dallas. She’ll share her success stories and how she learned by losing a lot of bids before landing the big one. She’ll be joined by Amy McGeady, APMP’s CEO, who will lead a proposal/bid professional fireside chat with Ms. Green, including questions from our audience.

Tara Green  joined the American Airlines Center in September of 2011 in the newly created role of Chief Revenue Officer. The American Airlines Center is the proud home of the Dallas Mavericks and Dallas Stars.

As Chief Revenue Officer at American Airlines Center, Green is responsible for leadership and direction that will generate and retain revenues across multiple channels for Suites, Club Seats and Sponsorships. She is implementing strategies, tools and systems to make sure American Airlines Center has continued success in Dallas.

Green spent the past three years as Vice President and Chief Operating Officer of the North Texas Super Bowl XLV Host Committee. She led, managed and directed all day-to-day operations for the Committee and was responsible for the oversight of all operations, including fulfillment of the group's NFL bid commitments. The North Texas Super Bowl XLV Host Committee generated more revenue than any previous host committee in the 45-year history of the game. Green was also part of the regional team that pursued and brought Super Bowl XLV to North Texas.

Prior to her duties with the Super Bowl, Green worked at the Dallas Convention and Visitors Bureau where she served as Vice President of Sports Marketing for
11 years, bringing many major sporting events to the community and increasing room-night production from 30,000 to over 150,000 room nights in a five year period.

9:30 a.m. – 10 a.m.  Morning Networking Break, Refreshments

10 a.m. – 11 a.m.  Using Automated Source Selection Scoring for Color Reviews
Edward Becker, Dell Services, Federal Government

Are you still using the same Pink/Red Team process with paper “feedback” forms used ten or more years ago? Are you still writing in the margins with red ink pens then working hours into the night making copies that you can’t read or understand the next day? This 1-hour presentation demonstrates new strategies and techniques used in conducting color reviews spanning Blue, Pink and Red Team sessions. This innovative process incorporates quantitative scoring concepts used by Source Selection Panels and automatically converts to color scores using Microsoft Excel conditional formatting. Using quantitative metrics, reviewers identify specific areas of strengths and weaknesses linked directly to section headings resulting in focused debriefs and actionable recovery efforts. Scorecards are electronic allowing reviewer comments to be incorporated in recovery efforts by copying and pasting. Scorecards can be emailed to remote authors and stakeholders immediately after out-briefs. This is perfect for remote review teams and virtual environments. This is definitely not your Daddy’s paper-based review process.

Eddie Becker has over 25 years of experience related directly to IT proposals in the Federal Government space. His experience includes capture and proposal management, business development, consulting, and training. Mr. Becker’s credentials include Shipley Certified Professional Capture Manager, APMP Proposal Practitioner, PMI Project Management Professional, and ITIL v3 Foundation certifications. Over the last 10 years, Mr. Becker has participated in the successful pursuits of more than 40 new business wins for different companies. His wins include over $877M in single award business and more than $748B in ceiling dollars on IDIQ and multiple award competitions. He has been a featured speaker on 3 different occasions for APMP-NCA Mid Atlantic Professional Day events and 2 occasions for APMP-NCA dinner meetings.

Page Architecture for Proposals
Nancy Webb, Nancy Webb Graphic Design

In this session you’ll learn how to recognize not only what looks good, but what makes your proposal pages effective. Engaging text, persuasive graphics, and enlivening color are all important visual components of a successful proposal. But you need more than just a template to assure effective pages. You must create that template with an understanding of how the human eye and brain process visual information. We’ll examine the use of text, graphics, color, and branding in the context of page architecture, with the basic concepts shown at work in actual proposal page examples. Good page architecture creates impressions of competence, clarity, and professionalism. Discover how the underlying architecture of your pages influences your evaluators’ response to
the content – even as, and often before, they do their first compliance checks. You’ll have evaluators reaching for your proposal first, and requiring that those that follow you meet the high standard you’ve set.

Nancy Webb is a Visual Communication Strategist and the owner of Nancy Webb Graphic Design, a studio specializing in graphic design, consultation, seminars and training. For over 25 years she has created identity systems, marketing materials, and books, while developing design directions and long-term strategies for a wide variety of clients—from Adobe Systems, Apple Computer, and the Points of Light Foundation to local businesses and entrepreneurs. Nancy’s unique blend of expertise in branding and book design, along with her immersion in typography and text design, have proven ideal for proposal work. Her passion for helping businesses improve the quality of their own visual communication fuels her enthusiastically received seminars and trainings.

Practical Competitive Intelligence (CI): Three Smart tools to Map Market Landscapes, Predict Competitor Actions & Craft Win Strategies

Geren Williams, CACI

Three smart tools that CI professionals use to construct market landscapes, identify key competitors and dark horses, compare strengths and weaknesses, and predict competitor actions. At the outset of a Capture effort there are four critical questions that have to be addressed: (i) Who are players in the market for this opportunity; how are they positioned? (ii) Which players are key competitors; which are dark horses? (iii) How do our strengths and weaknesses compare with those of keyy competitors and dark horses? (iv) How will key competitors compete in the market? Capture teams seldom put adequate thought and effort into answering these questions. They neither have the tools nor the practical experience to do so. This presentation introduces a trio of analytical methods that arm teams with new approaches for getting the best answers to these questions.

Geren Williams is a Vice-President of Capture Management for CACI, Inc. He is responsible for the successful pursuit of new and re-compete business and functions as Capture Manager for large (generally in excess of $100M), strategic, and high value opportunities. Prior to joining CACI, Geren was a senior leader in Booz, Allen Hamilton’s Critical Strategic Initiatives (CSI) team. CSI brought the firm’s most experienced competitive strategists and proposal experts together to focus on the largest, most complicated, and most strategic competitive procurements. Geren has 15 years of Government industry experience in successfully capturing new and existing opportunities. He is a member of Association of Proposal Management Professionals (APMP) and the Society for Competitive Intelligence Professionals (SCIP) and is certified in Competitive Intelligence by the Academy of Competitive Intelligence (ACI).
Building the Technical Solution  
**Brooke Crouter, Lohfeld Consulting**

One of a capture and proposal team’s goals should be early translation of client requirements into a solution addressing critical client business issues. Early development of a preliminary solution allows the team to preview the proposed solutions with clients to verify decisions, test alternatives, and make create awareness of information that might improve their perception of us. Previewing also allows us to gather valuable feedback to refine our detailed solution so it is client-centric and specific. Previewing may also help shape requirements that will appear in the RFP, providing us with a competitive advantage. The purpose of this session is to explore solutioning – what it includes, how to develop solutions, and how to use them prior to the RFP. It will address how to build a solution leveraging subject matter experts and a set of questions to get them focused on what is required. In a hands-on exercise, we will we will build a technical solution using the principals discussed.

**Brooke Crouter**, a Principal Consultant at Lohfeld Consulting Group, is experienced in program management and strategic leadership. She has supported competitive bids, capture strategy, offer definition, and proposal development. In addition to proposal management, she supports Lohfeld’s process and infrastructure improvement efforts, including crafting roadmaps to assist corporate clients improve capture and proposal processes and tools, tailoring them to each corporate culture; developing capture instructional materials; and creating and leading capture and proposal classes. During 15 years at Booz Allen Hamilton, she managed large program teams, helped establish a competitive framework, and provided thought leadership in past-performance, designing a firm-wide past-performance database and central CPAR management process. She has a BA (University of North Carolina, Chapel Hill), an MS (Naval Postgraduate School), and a certificate in Strategic Studies (Naval War College).

**11 a.m. – 12 p.m.**  
Ten Ways to Stop Your Bid from Going Down Under: A Commercial Case Study  
**Kelly Richmond, Bid Consultant, Australia**  
**Nigel Dennis, AM.APMP Regional Director (Asia/ Australia)**

Does your bid process usually involve late nights crashing documents, hair loss and intravenous coffee drips? Do your submissions resemble a Picasso painting with an eclectic array of fonts, messages and flow diagrams? Is there a direct correlation between the length of your nails and the days left till the bid is due? Well... you are not alone.

This presentation will showcase a real, winning, commercial case study which successfully tackled all the challenges that usually come in a pressured bidding environment...and a few more. Tight timelines, a complicated strategy in a
highly competitive industry, and virtual team management were just some of
the challenges faced for this bid which was critical to the client's business. The
presentation will not only provide a number of useful techniques on how to bid
but also a few on how NOT to bid!

**Kelly Richmond** has 12 years’ experience managing high-level communications
projects, including written proposals, websites, community engagement
strategies, internal communications, and publications in both Australia and the
United Kingdom. With extensive experience issuing, assessing and writing
tender, grant and award submissions both from and to government and private
industry, **Kelly has an excellent insight and understanding of concise and
strategic bidding.**

**Nigel Dennis** is co-owner of Australian consulting company Bid Write and has
presented at two previous APMP conferences. Working in Australia for 28 years,
with 17 of those years involved in tenders and proposals, Nigel has an excellent
knowledge of the business and bidding environment in Australia. Nigel is now
into his 3rd year serving on the APMP Australia New Zealand Chapter committee
and was also appointed to the APMP International Board this year as the
Regional Director Asia/Australia.

**Real Live Chat Room**

**Q&A with Production, Graphic Industry Titans**

**Matt King, Shipley Associates, Moderator**

**Are Good Proposal Managers Two-faced? Yes, and They Have to Be**

**Kristin Pennypacker, Lohfeld Consulting**

A good proposal manager has two distinct faces: one is strategic; one is tactical. Everyone is familiar with the tactical aspects of proposal management get the
team organized, create and stick to the schedule, and make sure delivery is on
time. The other face is strategic, working with the capture manager to identify
the storyline for the effort, getting the discriminators identified early, and
helping the capture manager gather the intelligence that will ensure the final
product is not just compliant, but really sells the firm. Good proposal managers
are able to go beyond the mastery of the process steps and interact at an
executive level with the capture manager, account executives, and company
leadership to ensure that strategy and tactics are synchronized. This session will
examine the two sides of proposal management, discussing how to incorporate
that strategic element into proposal execution.

**Kristin Pennypacker**, a Principal Consultant at Lohfeld Consulting Group, specializes in
competitive strategy and proposal management to win strategic opportunities in DoD
and civil markets. She provides strategic leadership and coaching for both capture and
proposal efforts, working with senior managers and staff on all aspects of procurements,
including competitive assessment, captures strategy, offer definition, and proposal
development. Prior to joining Lohfeld Consulting, she was a senior leader in Booz Allen Hamilton’s Critical Strategic Initiatives (CSI) team. CSI brought the firm’s most experienced competitive strategists and proposal experts together to focus on the largest, most complicated, and most strategic competitive procurements. She has a BA (Northwestern University), an MS (Johns Hopkins University), and a certificate in Systems Engineering and Competitive Intelligence.

**Memos, Guidance, Directives - Oh My!**

**Kristin Dufrene, CACI**

**Ali Paskun, CSC**

With recent increased activity aimed at acquisition reform, the Government has instituted measures to streamline acquisitions, promote competition, and increase Small Business utilization, while working with shrinking budgets and the DoD direction to “do more without more.” Government initiatives drive new trends that affect the capture and proposal process for industry. How do companies stay competitive in this new era of slashed budgets, BRAC considerations, government contracting staff turnover, and increasing competition? This presentation gives an overview of recent Government initiatives, including new FAR and DFAR amendments, Executive Orders, and guidance that affect Government contracting and how it is currently interpreted and implemented by the Government contracting workforce. Using case studies from two competing companies (CSC and CACI), participants will get real-life scenarios of how to address these trends in contracting from both a new business (competitive) and recompete (incumbent) perspective, including strategies and pitfalls.

**Kristin Dufrene**, AF.APMP, has been an active member of APMP since 1995 and has presented at nine International Conferences and NCR’s APMP Professional Day. She applies her 23 years of federal procurement experience as a member of APMP’s Government-Industry Acquisition Task Force, and served as Chair of the Task Force for two years. Early in her career, she was involved in the requirements definition for a large communications system, and for the past 20 years has focused on marketing, capture, and proposals for products, technology solutions, and service procurements. As Vice President at CACI, Kristin currently manages a team of proposal managers focused on “Business Sustainment”. She is responsible for managing the entire business development lifecycle for CACI corporate recompete and hybrid efforts, from pipeline management, strategy development, and milestone planning through the assignment of proposal managers and proposal reviews.

**Ali Paskun**, AF.APMP has almost 30 years' experience in the proposal industry. Currently, she is Director, Proposal Operations in the Intelligence, Surveillance, and Reconnaissance (ISR) Group for CSC. In this position, she manages, trains, and mentors a staff of professionals who support proposal activities across ISR Group. An active APMP member since 1999, Ali is an APMP
Fellow and accredited at the Foundation Level. She is the Managing Editor of the Journal of the Association of Proposal Management Professionals and Chapter Chair for the Chesapeake Chapter, which serves the Central Maryland area. Ali has a BS in Communications from the University of Maryland, University College.

12 p.m. – 12:30 p.m. Closing Ceremony & Prize Giveaways

Including Prize Drawings and Giveaways
Lone Star Ballroom Foyer
Bid & Proposal Con 2012 Exhibit Area

Win! Win! Stay with us for all of Bid & Proposal Con 2012 because you won’t want to miss this. We are going to give all Friday attendees a chance to win two incredible prizes! (Think shopping spree and an expense paid trip to Bid & Proposal Con 2013 in Atlanta, GA.) Attendees must be present at the closing ceremony to be eligible to win for these amazing prizes.