



# THE PROPOSAL DEBRIEF

## MESSAGE FROM THE PRESIDENT <<

July  
2016

Providing value to our members is our Board's primary focus. It's something we talk about a lot and it's generally the measuring stick we use when deciding what to offer our membership. Every program, webinar, event, or social gathering we offer is intended to provide value to you in some way. We put a lot of thought and work into making our chapter what it is, but sometimes it's hard to know how well we are doing.

*Pretty good, it seems.*

At BidCon this year, I'm proud to say that our efforts were recognized. Awards are given to chapters in several categories and our chapter was selected as the winner in the Special Events category. This is an international award recognizing our special events from 2015, including our webinars, local gatherings, and of course our Annual Symposium. I accepted the award in Boston, but the people who really deserve the credit are the 2015 Board and especially the Events Committee (Lavonda Prempas, Andrea Dunger, Megan Kean O'Brien, Aurelie Martins, Liz Megli, Sue Schumacher, and Brittony Martin). If you run across them, feel free to give them a well deserved "great job!"

And "great job" to all of you, our members. Events are always more successful when we get a high level of participation and we've had that all along. We will continue offering you value and we hope you will continue to participate. Let's keep this good thing going!

*Bruce Farrell  
Chapter President*

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## QUARTERLY QUOTE

**"Do something today  
that your future self  
will thank you for."**



## WELCOME NEW MEMBERS! <<

- » Rebecca Baiges, Stealth Entry LLC (Ohio)
- » Kari Blik, Rockwell Collins (Iowa)
- » Danielle Chesrow, CDW Direct, LLC (Illinois)
- » Erica Crouch, UnitedHealth Care (Minnesota)
- » Catherine Dutton, Badger Meter, Inc. (Wisconsin)
- » Wendy Evans, UnitedHealthcare StudentResources (Minnesota)
- » Lia Gordon, JLL (Ohio)
- » Rochelle Gorski (Wisconsin)
- » Chris Greig, BKD, LLP (Missouri)
- » Allison Grosvenor, Signature Performance (Nebraska)
- » Lauren Henderson, Hunt Construction Group (Indiana)
- » Ann Henry, HealthLink, Inc. (Missouri)
- » Timothy Herron, Technical Marketing Services (TMS) (New York)
- » Christa Hollensteiner, DRS Sustainment Systems, Inc. (Missouri)
- » Renee Howard (Ohio)
- » Tamara Kaup, Election Systems & Software, LLC (Nebraska)
- » Tiffany Lambert, Ulliman Schutte Construction (Ohio)
- » Maria Manske, Self (Minnesota)
- » Christine Martens, WAUSAU Financial Systems (Wisconsin)
- » Kaelyn McAboy, Truven Health Analytics Inc. (Illinois)
- » Amber McGlothlin, Evergreen Fire and Security (Washington)
- » Susan Melidosian, Navigant Consulting, Inc. (Illinois)
- » Daniel O'Donnell, Anthem, Inc. (Ohio)
- » Susan Pasqualone, Truven Health Analytics (Michigan)
- » Jodi Rizek, Battelle (Ohio)
- » Ann Scheer, Burns & McDonnell (Missouri)
- » Kate Schultz, Capstone (Minnesota)
- » Doug Smith, Capstone (Minnesota)
- » Gwen Stiewing, OpTerra Energy Services (California)
- » Keith Weber, Classis Consulting Inc (Oklahoma)
- » Kandice Williams, Equifax, Inc. (Missouri)
- » Brian Williams, Fidelity Investments (Kentucky)
- » Dustin Zahrt, Optum (Minnesota)

## WANT TO CONTRIBUTE?

Interested in writing an article for our next newsletter? We want to hear from you! In addition to providing informative and relevant content to our members, you can receive three Continuing Education Units (CEUs) for every article you contribute to the *Proposal Debrief*. For more information, contact **Hayley Flamm**.

SAVE NEARLY 20% BY REGISTERING  
BEFORE JULY 31 >>

# PLAY TO WIN REGIONAL SYMPOSIUM OCTOBER 3 - 4, 2016

**REGISTER TODAY FOR OUR FOURTH ANNUAL SYMPOSIUM!**

## Location

Hilton Garden Inn O'Hare, Des Plaines, Illinois | Group Rate: \$149 ([click here to reserve your room today](#))

## Date

October 3- 4, 2016 (evening networking reception on 3rd, and all-day educational sessions on 4th)

## Session Topics

**Winning as the Underdog** - David Bol

**Applying Endurance Training to Best Practices in Proposal Preparation** - Mark Wigginton

**Quality Play Book: Formatting and Editing Checklist** - Brittony Martin

**Five Forces That Help You Win!** - Randy Richter

**Keeping Score: How Do You Measure the Capture Team's Performance?** - Brandi Steckel

**Steve Bartman, the Chicago Cubs, and the Science of Happiness** - David Sotolongo

**Prep for Success: Strategies to Develop Your Winning Team** - Erin Thedwall

**Extreme Slide Makeovers** - Bruce Farrell

**IMPROVing Communications** - B.J. Lownie

## Symposium Registration - [click here to register](#)

**Early Bird Registration** (through July 31, 2016): \$160 for members/\$190 for non-members

**Regular Registration** (August 1 through October 3, 2016): \$190 for members/\$210 for non-members



REGISTER NOW AT [WWW.APMPGMC.ORG](http://WWW.APMPGMC.ORG)

Proposal  
**Vitamins**  
 to Boost Your  
**Competencies**

Whether you are beginning your career in proposal management or are a seasoned proposal guru, consider participating in a short-term group mentoring program. At any given time in our careers, we can be teachers or students, mentors or mentees. We all have experiences to share and takeaways to learn.

The APMP Greater Midwest Chapter is proud to offer you a **free** opportunity with your membership to participate in a series of six sessions to boost your dose of proposal management vitamins for professional growth.

In a group mentoring format for idea exchanges and experience sharing, each session will focus on one of the following Six Key Competencies based on the APMP Proposal Practitioner Assessment Questionnaire (PPAQ). Use these sessions to understand your strengths and weaknesses in your proposal role/career path and look for areas to grow. Or, use them to begin planning, collecting your thoughts/experiences, and goal setting to write your PPAQ. Either way, we encourage you to participate **and** receive one (1) CEU for each session you attend.

**6** | **CEUs**  
**Possible**



**Click on the links below to register. Have questions? Contact [Bette Sturino](#), our Professional Development/Mentorship Chair.**

**Planning:** July 13 from 12 p.m. to 1 p.m. CT

**Development:** August 3 from 12 p.m. to 1 p.m. CT

**Management:** August 24 from 12 p.m. to 1 p.m. CT

**Sales Orientation:** September 14 from 12 p.m. to 1 p.m. CT

**Behavior and Attitude:** September 28 from 12 p.m. to 1 p.m. CT

# MANAGING REMOTE STAFF

Bruce Farrell  
Plante Moran  
President of APMP GMC

**Okay...very remote staff.** A few years ago, we decided to hire a proposal writer who would work from our office in Mumbai, India. Our India team was already contributing to our consulting practice and we felt there was additional capacity in Mumbai to assist me. We intended to hire one writer, but in going through the interview process we identified two candidates who would add value to our team. We were glad we did so, though it took a little time and some lessons learned to fully utilize them. We added a third member to the team in April and, if our workload continues to grow, it is entirely possible will hire more in the near future.

## KEYS TO SUCCESS

So about those lessons learned. It turns out that just hiring really good people and giving them work isn't quite enough. Here are some things I found important to get the most out of a (very) remote team.

### 1. Recruiting the Right People

This is obvious, but good staff is the key to all good work and it's worth saying. It can be a challenge to find the right fit in any office, but finding someone who will fit with your team while working on another continent is more challenging. So challenging, there is a real temptation to settle. **Don't.** As my mother told me, patience is a virtue. Waiting to find a person who is a great fit will have long-term benefits and will save you a lot of short term aggravation. We are glad we waited for the right people rather than the first people that looked good on paper.

### 2. On-Site Leadership

When working with a team on the other side of the planet, it's critical to have good on-site leadership. Questions will come up during their day while the U.S. sleeps, so it's important to have someone on hand to answer them. Our Mumbai office has an excellent on-site manager and HR representative who can handle most questions or issues on site, which means they are already taken care of when I come in the following morning. And the first person I hired in Mumbai is now the team leader for my staff there, and he's well positioned to answer most proposal related issues on-site.

### 3. Communication

While on-site leadership is essential, regular communication with me and our home office is still important. Maintaining contact with our India office requires leveraging technology and forethought. We have a weekly staff meetings via teleconference, but spontaneous meetings rarely occur. To allow for more contacts with each of them as individuals, I work to make myself generally available via instant messaging at least three times a week when they are in the office. If an IM won't do, we talk on the phone or video conference.

### 4. Defined Roles and Tasks

Because we rarely work concurrently, we try to define roles and tasks plainly and specifically. This was a lesson I learned the hard way. When our India team came on board, I sometimes didn't give them enough direction and sometimes tasks were either done incorrectly or not done at all. With local staff, this is a problem that's easily identified and corrected in real time. But with our India office, there was enough lag involved that we wasted time and effort going back and forth on direction and remedies. The solution was to define tasks and responsibility with enough clarity that they couldn't be misunderstood, and since we've taken greater care to do so, we've worked much more efficiently.

## A REAL SUCCESS

My team in India has been an unqualified success for our practice. Our proposal workload varies widely week to week and the India team affords us the capacity and flexibility to get them all done (on time). What's more, our India team reflects our firm culture and values seamlessly. This is no small thing, because Plante Moran is one of those companies whose mission and values are more than just words on a page. They guide how we treat our clients and work with each other. In April, I was able to visit our Mumbai office for the first time and I was blown away by how well our values translate to another culture. In a trip full of spectacular experiences, it is probably the thing that pleased me the most. I loved India, but it is so much different than the U.S. (in good and bad ways) that it's hard to put into words. But when I walked into our Mumbai office, it was a Plante Moran office in every way.



# COMIC CORNER >>



## CONTACT US <<

- Bruce Farrell** - President
- Alan Minnick** - Secretary/Treasurer
- Liz Megli** - Communications
- Lavonda Prempas** - Events
- Sue Tellier** - Membership
- Bette Sturino** - Professional Development & Mentorship
- Hayley Flamm** - Publications
- Jackie Schneider** - Webmaster

*click on names to send an email*