THE PROPOSAL DEBRIEF

MESSAGE FROM THE PRESIDENT «

MARCH 2017

I'm sometimes asked about APMP. What is it? What kind of value do you get out of the organization?

I always start with the obvious stuff. There is a body of knowledge available to me. We hold an international conference each year where I can learn from other experts in our field. There are monthly webinars. And of course there are webinars and the Symposium in our chapter.

It's all great stuff and worth the price of admission.

But I always close with what means the most to me: the networking. I love talking about our profession with my peers. People who live in the world of business pursuits. Outside of APMP, it's rare to run into people who really understand what I do every day. But when I'm networking with my APMP colleagues, I'm with my people. I love it.

As a chapter, we're going to try hard this year to provide you with more opportunities to network with each other—virtually or in person. Toward that end, we are looking at putting together more local meet and greets for our members this year. We've done them in Kansas City, Milwaukee, Chicago, and Detroit in the past with some success. We're hoping to hit these areas and more this year. If you'd like to attend a chapter event in your area—or if you're willing to help us plan such an event—please contact someone on our Board.

Bruce Farrell
Chapter President

IN THIS ISSUE «

> "Even the lamest page can be saved by collaboration"
>
> *Philip Greenspun*

WELCOME NEW MEMBERS «

> Diann Albers, Spok, Inc. (MN)

> Judy Al-Zubeidi, BMO Global Asset Management (MN)

> Mary Andersen, ADP (IA)

> Wanda Atchison, IBM (IA)

> Victoria Averbukh, CoreSource, Inc. (IL)

> Matthew Beardmore, CDW Direct, LLC (KS)

> Alex Boren, Geonetric (IA)

> Jonna Bruining

> Jennifer Burt, IBM (MN)

> Melissa Castelli, Envolve PeopleCare (MO)

> Lizette Chagolla, International Code Council (IL)

> Beau Chapman, Field Aerospace (OK)

> Murray Collier, RSM LLP (IL)

> Diana Copp, Blue Cross Blue Shield of Michigan (MI)

> Jessica Couloute, Right Management (IL)

> Joanna Crowder, Insight Enterprises (IL)

> Dan Cubias, RSM LLP (IL)

> Bradley Cutshall, IBM (MN)

> Kathleen Dean, ARAG Insurance Company (IA)

> Linda Decker, CivicPlus (KS)

> Ryan Dillon, Avesis Inc. (MO)

> Megan Dooley, Cielo (WI)

> Shawnda Drennen-Schwartz, Arrow Value Recovery (OH)

> Lisa Endl, Network Health (WI)

> Jon Ericson, CBE Companies (IA)

> Danya Foster, Johnson Controls, Inc. (WI)

> Teresa Garcia-Brown

> Cathy Gibson, CoreSource (IL)

> Matt Gieseke

> Jennifer Gleason, Premier, Inc. (PA)

> Kelly Gmazel, The Christman Company (MI)

> Kim Greenspan, Plante Moran (MI)

> Karen Hansel, TEKsystems Global Services, LLC (KS)

> Victoria Hechtman, Willis Towers Watson (MI)

> Brian Heidt, CDW Government (IL)

> Christine Herrera, IBM (MN)

> Mai Xia Hoffman, Federal Government Solutions (IN)

> Salina Horton, International Code Council (IL)

> Jared Houtsma, IBM (MN)

THE CHAPTER NOW HAS:

DID YOU KNOW?

367 members on [LinkedIn]

87 followers on [Twitter]

119 likes on [Facebook]

WELCOME NEW MEMBERS *continued* «

- > Venkat Iyer, CapTech (VA)
- > Tony Johnson, Ascentech Enterprises, Inc. (OH)
- > James Kemmerer, BMO Global Asset Management (IL)
- > Michelle Kleppel, AECOM (OH)
- > Dan Kramer, IBM (MN)
- > Eileen Kunkler, The Ohio State University (OH)
- > Henry Larmie, ChRi Laboratories (MN)
- > Melissa Lasko, Compass Media, LLC (WI)
- > Scott Lavoie, AST Corporation (IL)
- > Larissa Lawson, Steelcase Inc. (MI)
- > Richard Lentes, Graybar Electric (MO)
- > Nancy Lewis, Ghafari Associates (IL)
- > Maria Llamas, Alcohol Monitoring Systems, Inc. (CO)
- > Suzanne Lodato, Indiana University Institute for International Business (IN)
- > Amy Marconi, Experian (IL)
- > Michael McBroom, Plante Moran (MI)

- > Nicole Meyer, Badger Meter, Inc. (WI)
- > Jeff Modjeski (IL)
- > Eva Montgomery, CadmiumCD (IL)
- > Shelley Munoz, BMO Global Asset Management (NV)
- > Ashley Murrell, Black & Veatch (WA)
- > Erica Newman, Capstone (MN)
- > Susan Paul, CoreSource, Inc. (OH)
- > Sharon Payne, Data Recognition Corporation (MN)
- > Alysson Pehoski, myON (MN)
- > Gareth Postans, Fiserv
- > Vaidhehi Regupathy, IBM (MN)
- > Jenny Roemer, Element Fleet Management (MN)
- > Camille Saltz, WorkForce Software (OH)
- > Cathy Salwin, ERDMAN (WI)
- > Jill Schroeder, TASC, Inc/Engility (MO)
- > Jeremy Scott, Envirocon, Inc. (CO)

- > Sanjeev Shahani, Acro Service Corporation (MI)
- > Rome Sheard
- > David Shutan, Cordant Health Solutions (CO)
- > Jason Stoltenburg, The Ultimate Software Group Inc (IL)
- > Allison Street, International Code Council (IL)
- > Kati Stutsman, Michael Baker International, Inc. (IL)
- > Katie Summy, Tepa, LLC (MO)
- > Kristen Thornton, Creek Technologies Company (OH)
- > Robert Tripi, Blue Care Network of Michigan (MI)
- > Gwen Ubbinga, CA, Inc. (NE)
- > Shelli Urness, United Healthcare (MN)
- > Kristin Wayman, Burns and McDonnell (MO)
- > Elizabeth Wieser, Siteimprove, Inc. (MN)
- > Amanda Wildeman, IBM (MN)
- > Melissa Willett, Bartlett & West (MO)
- > Alex Wishard, RSM LLP (IL)

Every effort has been made to ensure accuracy of this list. Any omissions or incorrect information is not intentional.

CORPORATE MEMBERSHIPS «

There are currently 92 members representing 19 companies with corporate memberships in the Greater Midwest Chapter. Is your organization next? For more information on how a corporate membership may benefit your proposal team, please contact **Hayley Flamm** at heflamm@burnsmcd.com.

EFFECTIVE COLLABORATION TOOLKIT 《

Margaret Helwig is a bid writer for Delta Dental of Michigan. Located in Lansing, she has been an APMP member for three years, receiving her Foundation certification in 2015. Prior to her position at Delta Dental, Maggy worked at Pierpont Community and Technical College as an assistant professor in Liberal Studies, teaching Composition, Developmental English, Technical Report Writing, and Race, Class ad Gender in Popular Culture. She is an avid reader and Girl Scout Leader who enjoys CrossFit in her spare time.

Years ago, I attended a conference session for a group peddling a "Personality Matrix" tool designed to help managers create teams by identifying the key personality traits of their members. Employees took a two-hundred question test that determined what their three dominant traits were – and those of us who had signed up for the session got the joyful experience of taking the test for free. The rest of the session focused on putting the right personalities in charge of the right portions of projects. Sounds like a good plan to me.

Reality Check – I have yet to be in any work situation where you can actually pick the people you work with based on their personality. In fact, most projects would have vastly different teams if this was an option. The reality is that teams are based on skills and knowledge, not whether at least one person has a strong leadership personality (have fun with three or four of these in a room) and at least one person has an intense sense of responsibility (who invariably takes the lion's share of work when no one else volunteers). Since we can't pick teams based on who will get along, what can we do to ensure that collaboration is successful? It's less about personality and more about the right tools.

What you need to get the job done:

This is where the Effective Collaboration Toolkit comes in. It isn't a software solution or project management diagram. It's a set of skills and guidelines that can set the stage for effective, efficient teamwork. This is just a start – as you work with your team, you will figure out what else you need. You may need to ensure that someone records meetings or that someone brings food. These "tools" will at least get you started and through the first few meetings/communications.

Defined Goals and Measurable Expectations

Clearly defined goals that are logical and reachable are essential. There is a time and place for vague thought-exercise meetings intended to gather ideas, just not necessarily when completing a project. This is especially true in proposal management.

You have a deadline and a very specific goal – to create and present a winning proposal. However, you need to be specific about the expectations for each collaborative unit. If you are trying to develop a specifications document, then that should be the final goal – not the whole proposal.

Even "develop a specifications document" is too broad. You will need to clarify further. Include details about the exact content required, the audience, and the level of detail needed. Some of this is addressed in the next tool, but some of it belongs here. Rather than start with developing a document, consider this instead: "Develop a presentation of the company's collaboration software for a multi-state organization with several detail-level options to be reviewed by executives." This statement has a clear end goal, but still offers room for flexibility if the team identifies solutions that will work particularly well for the target audience.

If you have not heard of SMART goals, look it up. By setting SMART expectations, your team knows exactly what is expected. A "good" document is not measurable. What you or your experts feel is "good" may differ from what the evaluators who are deciding on the contract expect. Instead, set your expectations with measurability in mind. It makes more sense to ask your SMEs to come to the meeting with a list of five to seven essential elements of their topic that need to be included, described with a lay audience in mind (understanding that you may need to do additional editing).

Clear Scope and Reasonable Timeline

It can become very easy to throw everything and the kitchen sink into a project. However, without limits, nothing will get done. Be sure the group knows the limits of what they are trying to accomplish. In the scenario above, the audience dictates you keep limits in place on length and detail, as the people evaluating the solution are busy and may not be experts in software design. Keeping audience and purpose in mind can help your team stay on track. Communicators are trained to keep their audiences in mind; most other experts are not.

Margaret Helwig, Bid Writer
Delta Dental of Michigan
Questions? Please contact Margaret at
mhelwig@deltadentalmi.com

(In college, I had several professors with trouble presenting at an introductory level.) It can be edifying to work with subject matter experts, and a trial reining them in on their areas of expertise. A clear scope, with audience and purpose in mind, can go a long way to keeping someone close to their topic from leaving the rest of us behind.

Ever walk into a meeting scheduled for an hour knowing the agenda easily represents several hours' of work? When you call your team together, keep in mind the timeframe and consider under-scheduling. Having time at the end of the meeting is preferable to incomplete or rushed tasks. Ask your team to come prepared with specific things complete and ready to move to the next step.

Conscious Communication and Effective Follow-up

Throughout the collaboration process, communication is key, but no one wants to receive a deluge of email. Below are a few tips to keep in mind:

- Send meeting requests with the agenda attached and details of what is expected beforehand.

- Be aware of tone in written messages. Email is a tricky medium that can make collaboration unintentionally difficult.

- Follow-up meetings with summaries and clear details of expectation for each member.

- Ask for deadline input from your team, but be willing to counter unreasonable requests. Your team knows their schedules, but also need to account for the urgency and complexity of the current project.

- Follow-up with members who seemed disengaged or unsure. They may need clarification, but were uncomfortable asking.

- Send reminders, if necessary. In time, you will know who benefits from a brief reminder and who delivers as expected.

Through planning and communication, you can bring collaborative efforts together. You will still meet, and possibly exceed, your goals, regardless of your Myers Briggs classifications.

SUGGESTED READING «

> Brinkman, Rick, and Rick Kirschner. Dealing with Difficult People: 24 Lessons for Bringing Out the Best in Everyone. New York, New York: McGraw-Hill, 2006.

> McChrystal, General Stanley. Team of Teams: New Rules of Engagement for a Complex World. New York: Penguin Publishing Group, 2015.

> McCormack, Joseph. Brief: Make a Bigger Impact by Saying Less. Hoboken, New Jersey: John Wiley & Sons, Inc., 2014.

March Webinar

Telling Your Story: Compliant and Compelling Proposal Themes that Win

Presented by: Chris Simmons, Founder & Principal of Rainmakerz Consulting LLC

March 30, 2017 at 11:05 a.m. Central

Synopsis: Winning is all about standing out from 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 simple structured approach to writing proposal themes more efficiently and effectively. Based on his APMP award-winning article, "How to Create Winning Proposal Themes", Chris shares some proven methods, processes, and lessons learned to tell a more compliant and compelling proposal story using theme statements and focus boxes. These proposal elements significantly improve proposal efficiency and increase proposal effectiveness. In the end, you win more and work less. Participants can significantly benefit from reading Chris's article, "How to Create Winning Proposal Themes", in advance of the webinar.

Chris Simmons is Founder and principal member of Rainmakerz Consulting LLC, a business development and relationship management consulting services company providing strategic sales, marketing, and related consulting services.

Chris has delivered a wide variety of business development consulting services to more than 165 clients including Accenture, ACS, AMS, AT&T, BankOne, Booz Allen Hamilton, Citigroup/MasterCard, IFC (World Bank), Keane, Lockheed Martin, NextiraOne Federal, Pearson, Perot Systems, Raytheon, QinetiQ North America, and other lesser known companies in the US, Canada, Central America and the UK.

Chris has supported successful new business development projects at CGI (AMS), Xerox (ACS), Keane, Pearson, HP (EDS), Dell (Perot Systems), Raytheon, QinetiQ North America, 3Ti, AEM, Team Catapult, Triumph Enterprises, Halo, HCRN, JDG Communications, The Paul Bramson Companies, TRP Media, and other companies resulting in revenue of over $82 billion.

Chris holds a BA in Psychology from Boston College, and an MBA in Management Information Systems from the University of Massachusetts at Amherst.

SAVE THE DATE:

2017 GREATER MIDWEST CHAPTER SYMPOSIUM

October 10th and 11th

Four Points by Sheraton Chicago O'Hare Airport

10249 West Irving Park Road, Schiller Park, IL 60176

Stay tuned for further details!

MEET LOCALLY »

We are currently scheduling local Meet and Greets throughout our 12 state membership region. In the past, we have held these events over happy hour, morning coffee, dinner, or at a member's office. If interested in hosting an event, have any questions, or have a suggestion to share with the Board, please contact **Andrea Dunger** at Andrea.Dunger@vizientinc.com

Read a good book lately that applies to your role in business or proposal development?

If you answered YES, please consider sending us a summary and/or review to include in our new **Off the Shelf** segment.

We'd love to hear about what our members are reading and add a few great books to our shelves as well!

Ideas or suggestions?

Contact **Stacey Duwe** at stacey.duwe@wellsfargo.com
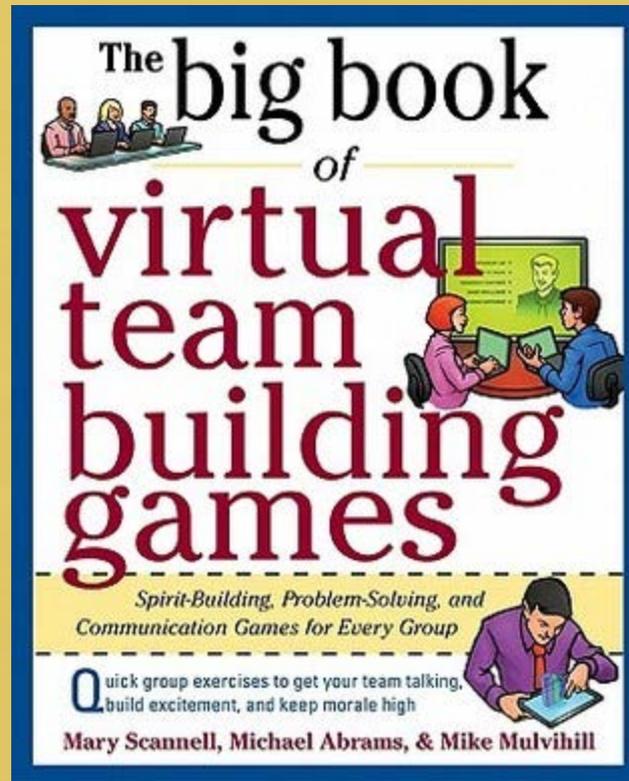
Scannell, M., Abrams, M. & Mulvihill, M. *The Big Book Of Virtual Team Building Games: Spirit-Building, Problem-Solving, and Communication Games for Every Group*. New York: McGraw Hill, 2012.

The Big Book of Virtual Team Building Games: Quick, Effective Activities to Build Communication, Trust, and Collaboration from Anywhere! **By Mary Scannell, Michael Abrams & Mike Mulvihill**

As a new manager of a virtual team, I have been interested in learning creative ways to engage and build trust among my team members and increase communication between myself and my team. *The Big Book of Virtual Team Building Games: Quick, Effective Activities to Build Communication, Trust, and Collaboration from Anywhere!* is a book I stumbled across recently that provides from useful suggestions and activities.

This book is a quick and easy read, and it serves as a nice tool for anyone involved in a virtual team environment, whether you're just getting established in your virtual team or you're looking for ways to increase trust and communication in an already well-established team.

The authors discuss various stages of team development to help you assess which activities/games would be good for engaging your virtual team. For example, if you're team is in the "Forming" stage, one of the activities suggested is "Background Story" where team members are tasked with sharing an interesting story from their past that will help others on the team get to know them better. The stories are collected by the manager, de-identified and shared with the rest of the team. The team is then asked to guess who each story belongs to, and the author of each story identifies themselves after all guesses are submitted.

Whether you're a new team, adding new members to your established team, or an already established team that just likes to participate in fun team-building activities, this book has something for everyone and will surely help you engage your teams in activities that will aid in creating a cohesive and collaborative environment.

Reviewed by Stacey Duwe, CP APMP

COMIC CORNER «

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 (3) Continuing Education Units (CEUs) for every article you contribute to the *Proposal Debrief.* For more information, contact **Stacey Duwe** at stacey.duwe@wellsfargo.com.

If your article is chosen for publication, you will receive a $10 Starbucks or Amazon gift card. All published articles will be entered into our 1st annual Article of the Year contest. APMP Greater Midwest Chapter members will vote on the Article of the Year (of March, June, and September submissions) after publication of the September newsletter. The winner will earn eternal bragging rights and be presented with an Award and a $100 Amazon gift card at our Annual Symposium in Chicago in October. Contact Stacey Duwe for details or questions.