



APMP Nor'easters Fall Symposium Getting to First Place

September 27, 2007

Westford Regency Inn & Conference Center
Westford, Massachusetts



Welcome

Dear Friends and Colleagues,

It is my great pleasure to welcome you, on behalf of the Board of Directors, to the APMP Nor'easters Fall Symposium, "Getting to First Place." The Symposium – the first of its kind in our area – brings together a diverse group of experts to share insights, identify solutions and create additional avenues for collaboration in reaching our common goal of advancing the proposal profession within the New England region.

The Symposium agenda truly includes something for everyone: presentations on team management, quality benchmarks, effective graphics, collaborative tools, competitive analysis, professional development, and more. We expect that the thinking displayed in these presentations will, like the Symposium itself, lead to significant and surprising steps forward in years to come.

Thank you for your time and your attendance. Most importantly, thank you for your commitment to the future of proposal development in the Northeast U.S.

Jonathan S. Myerov
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President, Nor'easters Chapter
DarwinSuzsoft, Wakefield MA

Symposium Contacts

Registration:

Lisa Payne – lpayne@xrsolutions.com
Tim Nason – tnason@tycoint.com

Venue:

Beth Goonan – egoonan@pragmatech.com

Presenters:

Paula Grey – pjgrey@gmail.com

Exhibitors:

Paul Heintel – pheintel@ensr.aecom.com



Venue

The **Westford Regency Inn and Conference Center** is a privately owned and operated Inn and conference center located in Westford, Massachusetts, approximately ¼ mile off of Route 495. The Inn is a full-service facility offering 193 guestrooms, 20,000 square feet of conference and banquet space, a 15,000 square foot health club, and a luxurious marble and mahogany paneled lobby with free wireless internet connections.

Address: 219 Littleton Road, Westford, Massachusetts 01886

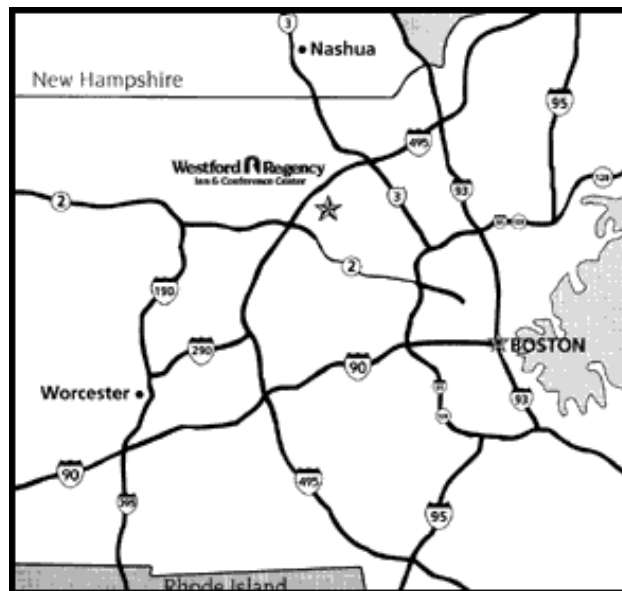
Phone: 978-692-8200

Fax: 978-692-7403

Web: <http://www.westfordregency.com/home.html>

A special room rate of \$110/night is available; just let the Regency know you're attending the APMP Nor'easters event!

Directions



From the North:

Traveling south on I495 take exit #32 "Westford, to route 225". At the end of the ramp, turn left onto Boston Road. At the first intersection, turn right onto route 110 west. The hotel is located ¼ mile on the right side.

From the South:

Traveling north on I495 take exit #32 "Westford, to route 225". At end of ramp, turn right onto Boston Road. At the first intersection, turn right onto route 110 west. The hotel is located ¼ mile on the right side.

From the East:

Take I93 north for approximately 17 miles to I495 south. Take exit #32 off of I495 south "Westford, to route 225". At the end of the ramp, turn left onto Boston Road. At the intersection, turn right onto route 110 west. The hotel is located ¼ mile on the right.

From the West:

Take I90 East/Massachusetts Turnpike to I495 north. Travel 30 minutes to exit #32 "Westford, to route 225". At end of ramp, turn right onto Boston Road. At the first intersection, turn right onto route 110 west. The hotel is located ¼ mile on the right side.



Presentations Schedule – Thursday, September 27, 2007

Time	Activity	
8:00 am – 9:00 am	Registration	
9:00 am – 9:30 am	Chapter President's welcome and opening remarks	
	Track 1	Track 2
9:45 am – 10:45 am	Collaboration Tools and Adoption David S. Hawkins	Proposal Pictionary! How to Turn Your Words into Pictures! Mike Parkinson
10:45 am – 11:00 am	Break	
11:00 am – 12:00 pm	Applying Six Sigma to the Proposal Development Process Tracy Warren	Marketing Your Assets: Resume Development/Interview Prep Lauren MacArthur, C.P.C.
12:00 pm – 1:30 pm	Lunch & Announcements	
1:30 pm – 2:30 pm	Overcoming Business Culture Obstacles in Proposal Development Processes and Infrastructure Mary O'Sullivan	Competitive Intelligence – Getting to First Place David Murphy
2:30 pm – 2:45 pm	Break	
2:45 pm – 4:45 pm	The 3-Ring Model for Motivating, Recognizing, and Rewarding the Proposal Team Jay Herther	Oh the People You Will Meet BJ Lownie
4:45 pm – 5:00 pm	Closing Remarks	
5:00 pm – 6:30 pm	Happy Hour	

Cancellation Policy

Cancellations received on or before Friday, September 21, 2007 will receive a full refund.

Cancellations must be submitted by e-mail to the Registration Coordinators, Lisa Payne (lpayne@xrsolutions.com) or Tim Nason (tnason@tycoint.com). No refunds will be provided for cancellations made after September 21, 2007.

Attendee substitutions are allowed. In the event the symposium is cancelled due to too few registrations, full refunds will be made to all registrants.



Abstracts & Bios

9:45 am – 10:45 am Presentations (Breakout Rooms)

Collaboration Tools and Adoption

David S. Hawkins

There are a number of collaborative tools for team and project management available today, produced by a variety of vendors with varying core functionality. There are four specific products on the market today that are intended to be used broadly without a specific core purpose outside of being collaborative tools. These four solutions include: 1. Microsoft SharePoint, 2. EMC Documentum eRoom, 3. Microsoft Groove (formerly just Groove), and 4. BaseCamp. In order to use any of these solutions effectively, a set of general practices apply across all these platforms. This presentation is about those best practices that apply to all the versions of products mentioned, but will use the EMC Documentum eRoom as the example.

David Hawkins has been in the IT industry for over twelve years, holding a variety of roles including user, admin, systems engineer and sales person for a variety of IT solutions. With over eight years experience in working with bid teams and over 10 years of content creation for IT solutions, he is a very knowledgeable practitioner of Knowledge Management, Team Management and Project Management tools. David's practices have been used as a use-case scenario for Groove prior to the Microsoft Acquisition. David is a Bid Manager for RSA, The Security Division of EMC handling proposals for over twenty IT solutions that serve the Financial, Government and Enterprise Commercial markets.

Proposal Pictionary! How to Turn Your Words into Pictures!

Mike Parkinson

Visuals increase success rates up to 43%, communicate 60,000 times faster than text, and give ideas 22 times more impact than text alone—so why are there so few pictures in proposals? Learn how to visually design your proposal to maximize audience perception AND how to turn your ideas into clear, communicative, compelling visuals. Using the new tools you learn from the presentation we will break into teams and play Proposal Pictionary! – literally practicing our new skills to communicate common proposal ideas through graphics to win prizes. No previous graphics skills necessary – just a sense of fun!

Mike Parkinson has spearheaded multi-billion dollar projects and created thousands of graphics resulting in billions of dollars in increased revenue for his clients. Mike is part owner of 24 Hour Company (www.24hrco.com), the premier proposal graphics firm. He is often requested to speak at national conferences, large and small companies, and graphic industry events. Recently, Mike wrote the first and only book that teaches business professionals how to easily conceptualize winning graphics (www.BillionDollarGraphics.com).



Abstracts & Bios

11:00 am – 12:00 pm Presentations (Breakout Rooms)

Applying Six Sigma to the Proposal Development Process

Tracy Warren

Six Sigma® is a disciplined approach to eliminating defects in any process by reducing variation from specifications wherever possible. The term was coined by a Motorola engineer, and the approach was first applied to manufacturing and other qualitative environments. In recent years, the concept has been expanded to apply to everything from product development to services.

In 2005, McKesson Health Solutions (MHS) made the decision to apply Six Sigma to the RFP response processes for its two proposal groups, one in Colorado that supports the sale of complex services and one in Newton, Massachusetts that supports the sales of medical management software and clinical content.

The presentation will recap why MHS decided to apply Six Sigma to the RFP process, how the Six Sigma evaluation was conducted by a McKesson Six Sigma “black belt,” and what the results were. It will also explain which final recommendations MHS proposal groups have implemented, and how; explore what recommendations were not adopted and why; summarize what parts of the Six Sigma process went well and what did not; and offer recommendations for any proposal team considering employing a Six Sigma improvement project.

Tracy Warren is the proposal manager for McKesson Health Solutions’ medical management products in Newton, Massachusetts. She has 18 years of experience in proposal development, mostly as a consultant helping growing organizations to develop proposal processes, procedures and content. Some companies Tracy has previously worked with include BIO-key International, Lau Technologies, Viisage Technology, and Digital Equipment Corporation/Compaq Corporation. Tracy has a BA in English and is pursuing an MA in Professional Writing at UMass Dartmouth.

Marketing Your Assets: Resume Development/Interview Prep

Lauren MacArthur, C.P.C.

In this workshop-type session, Lauren MacArthur will share insights and strategies for proposal developers to maximize their marketability and get hired in the metro-Boston area. Session participants are invited to bring their resumes to work on during the session. Key tactics to be discussed include: evaluating true strengths and accomplishments, prioritizing skills, generating sample/example portfolios, and formatting secrets.

Lauren MacArthur is a certified personnel consultant and partner with Winter Wyman, a leading staffing firm with locations in Waltham and Washington, DC. She has 16 years of experience and is a principal in the company’s practice in information design and delivery placement. Her focus is on writers, trainers and UI / web designers. Before joining Winter Wyman, Lauren was president of Fanning Personnel of Waltham and vice president of Fanning Personnel of Boston.



Abstracts & Bios

1:30 pm – 2:30 pm Presentations (Breakout Rooms)

Overcoming Business Culture Obstacles in Proposal Development Processes and Infrastructure

Mary O'Sullivan

Many proposal professionals face serious business culture obstacles in bringing process discipline to their companies, even if they are hired to do so. This presentation shows a path to success for a proposal professional in this position. The presentation addresses the issue of gaining credibility, the importance of being mentored (even at age 50+), and the ability to hang in there when you feel that you may not be aligned with your business culture. Bucking an established culture takes perseverance, creativity, and a strong constitution. Also included is a discussion of clues which tell you when you're there...

Mary O'Sullivan is Manager, Proposal Development for Raytheon Integrated Defense Systems' Maritime Mission Center in Portsmouth, RI. She started proposal work in 1976 as a summer editor at GE Aerospace in Syracuse, NY. Mary joined GE Aerospace full time in 1985 as lead editor, and since then has worked in various proposal management roles at Sanders (now BAE Systems) and Lockheed Martin, Valley Forge, PA and Moorestown, NJ. Since joining Raytheon in November 2001, Mary has initiated many innovations to the capture proposal process, including introducing the concept of a formal, documented process for Win Strategy Workshops, Blue Teams, Black Hat Reviews, and Pink and Red Teams. In addition, Mary led the design and development of a new proposal development infrastructure and matrix organization, including a new 8,300 sq ft facility and capture/proposal website and searchable proposal library. Mary has instructed Raytheon's Winning New Business Course as well as Raytheon's Deal-to-Win Course, Black Hat Segment.

Competitive Intelligence – Getting to First Place

David Murphy

Too often capture and proposal strategy is pre-determined by the route we've taken along the competitive path. We repeat "the way we've always done it" and fail to understand why the competition wins. Sun Tzu (The Art of War) said "Know the enemy and know yourself and you will never be defeated." Knowing where to ethically obtain CI is one thing, doing the right thing with it is another.

The CI challenge is twofold: First, ethically and objectively collect and analyze CI for each opportunity. Second, use the analysis (knowledge) to drive a winning strategy fulfilling customer needs, wants and desires. This presentation addresses the Competitive Intelligence collection/analysis process and its effects - Getting to First Place.

David Murphy is a Senior Associate at Shipley Associates. David specializes in Cost Volumes, Price To Win analyses, Earned Value Management, and the preparation of IMP/IMS/WBS/BOEs. David has 28 years of experience in proposal writing, business development, and system development with the BDM Corporation, Lockheed Martin, and Sybase. A 1976 graduate of the University of Maryland, David began his career in intelligence in the US Air Force. He presented Price To WIN! at both the APMP SOCAL Chapter's 2005 Fall Conference and again at the 17th Annual APMP Conference in New Orleans in 2006. He presented Incumbent vs. Challenger – Who has the Advantage? at the 18th Annual APMP Conference in Savannah, GA in 2007.



Abstracts & Bios

2:45 pm – 4:45 pm Presentations (Main Room)

Oh the People You Will Meet

BJ Lownie

“The world of proposals would be so easy if it wasn’t for the people.” That might be how you feel if you haven’t had great success dealing with difficult team members. Or perhaps you’ve worked with a great team, believe the opposite and think, “The world of proposals is fun and exciting because of the people.” Whichever way you feel, if you’re in the proposal business, you need to be able to deal with all sorts of personalities and bring out the best in the people that make up your team. In this informative, engaging and highly entertaining presentation, BJ Lownie, a favorite presenter at APMP conferences, presents some of the many interesting characters he’s met along the way and offers techniques, tactics and tips for dealing successfully with the various personalities you’re likely to encounter in the world of proposals.

BJ Lownie is the Director of Strategic Proposals LLC. BJ brings an incredible depth and breadth of experience within the proposal arena. He has more than 20 years experience, has worked on hundreds of proposals and had more than 3000+ participants attend his workshops and his many APMP conference presentations. Clients who rely on his expertise include Franklin Templeton, HP, RBS, JPMorgan/Chase, SAP and many others. BJ is an APMP founding and charter member who has achieved ‘Professional’ accreditation (the highest level awarded) and been recognized as an APMP Fellow. In addition, Strategic Proposals is one of the select few firms recognized by APMP as an Approved Training Organization.

The 3-Ring Model for Motivating, Recognizing, and Rewarding the Proposal Team

Jay Herther

“Failure to lead, leads to failure” [Amrhein, 2002]. As a Capture Team Leader, Proposal Manager or Book Boss, this presentation will provide valuable proven hands-on techniques for leading including motivating, recognizing and rewarding the Proposal team. These are necessary techniques to Getting to First Place. As a teenager, the author worked as a busboy at Denny’s restaurant. Now, over 30-years later, some of the same management lessons learned in the restaurant industry are correlated to the Best Practices witnessed in Jay’s 20 years of winning in the Proposal Management field. In addition to these time-tested proposal concepts, this briefing summarizes academic and some APMP research on ways to motivate, recognize and reward the proposal team.

Jay Herther has 20 years experience leading Capture teams to achieve a 78% win rate totaling over \$10 Billion. He is a member of the APMP Nor’easters Chapter and author of three APMP Journal articles: *The Difference between Winning & Losing Capture Efforts*, *To Bid or Not to Bid – That is the Question!* and *Campaign to Win!* Jay has presented twice at the National APMP Convention, and was recognized with the 2007 “Insight Award” at the 18th Annual APMP International Conference. He is also the recipient of the Lockheed Martin NOVA Award for Outstanding Leadership and 2007 Winner of the BAE Systems Chairman’s Award for “A BluePrint for Winning.” Jay has two Masters degrees from MIT, and has published 9 articles and been granted two patents.



Corporate Sponsors & Exhibitors

The APMP Nor'easters would like to thank the following firms for their generous sponsorship of the Fall Symposium and the chapter. Please be sure to visit their booths at the event.

