2019

VIRTUAL

USER

CONFERENCE

10.3

SESSION QUESTIONS

Questions Answered

Thank you for making Privia's 2019 Virtual User Conference such a success. We are overwhelmed by the community response and feedback, which includes our highest registration count to date and top marks on speakers, variety, and format.

Proposals unite a broad community of people and activities. While each individual specialist may represent a critical field of expertise necessary to develop a winning proposal, it takes their collaboration to win consistently. No matter how compelling your capture strategy, if the team can’t collaborate on writing and reviewing to it, the result will fall short of the compliance and quality today’s evaluators crave for the award.

Industry insights, lessons learned, and best practices aimed at efficiency, quality, and success through collaboration was the goal of the day. We invite you to take advantage of the comprehensive post-Conference information we share at Privia.com.

Thank you to all of our generous and inspiring Speakers for making it a collaborative day.

Keep Calm and Proposal On!

Getting to the Win: From Capture Strategy to Persuasive Proposal

Jacqueline Gombach, Founder and CEO, Captuva

Proven strategies for translating your capture strategy into a compelling story that conveys value to the client.

Question: How do you write to a future state if the RFP doesn't ask for it?

Answer: Great question and in fact it's quite typical that the client does not ask for the future state explicitly in the RFP. They provide a host of requirements that will eventually add up to the future state but it's on the shoulders of the vendor in their response to paint the picture. At times the client may not know their future state and hence a reason for the solicitation is for vendors to come help them both envision and achieve it.

Question: What team members should be involved in developing win themes?

Answer: This is a frequent question I get from proposal teams. Capture and/or proposal manager; field sales team (they are the people who know the client the best and understand the client's pain points); section leads (expecting that this is just a few people, if many, then limit); and a team member or consultant who hasn't been deeply involved in the pursuit to bring outside perspective. The win themes then need to be presented and shared with all writers and the entire proposal team – including graphics resources– so that everyone is aligned.

Question: What suggestions do you have for shortening the proposal response time?

Answer: Leveraging your proposal repository/content provides a solid basis of tested material; just remember this content needs to be tailored. In fact, there are sessions later today on Managing Proposal Content and Process Automation. Knowing your true differentiators going into the proposal helps considerably as you can simply hone those for this effort and not need to create them, as there is a heavy investment exercise to get them right. Understanding what's keeping your client up at night and what they are seeking – this comes from your field sales efforts so make sure this gets shared with the proposal team. Storyboarding – spend time early on this to save cycles later. There is a session on this later today on Storyboarding so be sure to stay tuned in!

Question: Who are the key stakeholders we should include in storyboarding for developing a compelling Exec Summary & Win Strategy?

Answer: Capture and/or proposal manager; field sales team (they are the people who know the client the best and understand the client's pain points) and a team member or consultant who hasn't been deeply involved in the pursuit to bring outside perspective.

Continued...

Getting to the Win: From Capture Strategy to Persuasive Proposal, *continued*

Question: What tools do you recommend using to gather and communicate the capture strategy?

Answer: There are a wide variety of tools available to companies for use in the sales process. The capture strategy typically includes a variety of assets that can be generated from these tools but may also be documented in other means. My recommendation is to make sure to document the strategy, communicate it to the team and revise it as necessary as insight is gained from client interaction and competitive due diligence.

Question: How do you get the team to move from the same old win themes/for the same solution every time, to new win themes specific to the proposal?

Answer: Engaging the help of an outside consultant is a great way to bring fresh perspective to your win themes. If this is not a viable option for your firm, then engage co-workers from other divisions within your firm who have not been deeply engaged in the past. Additionally, competitive due diligence may bring perspective to the team that your win themes aren't so unique (if competitors sound similar) and/or it may surface ideas for how to evolve your own.

Click to Learn More: Captuva

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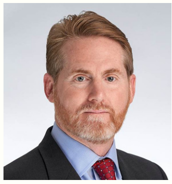

On-the-Go Web Commenting

Jay McConville, President and CEO, Privia

Get ready for Privia to rock your proposal world with online, real-time, simultaneous Web Commenting - that works with Smart Phones and Tablets.

Question: How is this commenting feature different from the current commenting feature?

Answer: With the release of our new Web Commenting feature, contributors (for example proposal reviewers) can use Privia with only a browser anytime, anywhere, to review and comment on proposal documents, spreadsheets and images. No software installation is required, which Mac and Chrome users will love, and the user interface works on Smart Phones or Tablets. There are some other upgrades too over our current commenting tool - including an often asked for ability to switch back and forth rapidly between versions, improved highlighting and search, and a more flexible interface, among others. A major breakthrough of this capability is that now, with the exception of Admin Tools and Process Designer, no client installations are needed for full Privia functionality, making deployment of Privia across even the largest enterprises a snap.

Question: When will this new feature be available?

Answer: Web Commenting is being announced today, will be available to our Beta partners starting in late October, and will start rolling out to hosted clients in January followed by on-premise clients (who choose it) in April 2020.

Question: Is there an addtional cost for this feature?

Answer: There is no additional cost for this feature, just additional flexibility and convenience for on-the-go reviewers.

Click to Learn More: Efficiency in Proposal Management

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Managing Proposal Stress

Mairi Morrision, Proposal Consultant, Strategic Proposals Limited

Proposal work is stressful. Hear the latest research and learn insights into managing proposal stress for better well-being. (APMP Professional)

Question: How did you reach out to peole to conduct your research?

Answer: The topic of mental health & well being in our industry has recently become a hot topic, and I looked around for research and could only find information about the general workplace. I decided to conduct my own research so I could compare the findings (proposal industry v general workplace). I set up a survey through SurveyMonkey and launched it via a post on LinkedIn. My colleagues also shared it on LinkedIn so I reached a wider audience... and then i just watched the results come in.

Question: What's the #1 stress trigger you see as proposal professionals we need to watch out for?

Answer: I think there are a lot of stress triggers: seemingly impossible or tight deadlines, not enough resources on the team, managers who don't listen when you're struggling. For me, I'd see the tight deadlines as the main stress. And this can be manageable by us proposal people by taking a step back, breathing deep and making a time plan that also builds in contingency for when things go wrong (as they always do). Keep referring to the time plan on a daily basis, so that you catch problems early on and can provide solutions to them. And remember to take care of yourself and shout when you're struggling.

Question: How do we take care of ourselves despire crushing deadlines?

Answer: Take time for yourself. It's hard because when we are faced with crushing deadlines, all we focus on is meeting that deadline. It's the professional way to be. But remember, you are a human being and you need healthy food, good sleep and time to relax. All these things will provide you with the strength to meet those deadlines in a happier way.

Question: What can company's do better?

Answer: Companies need to understand their proposal people. What do they struggle with, what helps them. Managers need to be educated in mitigating stress in their employees and be able to listen and help those who come seeking help when they feel they are struggling to meet a deadline.

Question: Who do we contact if we need help?

Answer: There are various ways of reaching out for help: talk to your manager, your colleagues, or other proposal professionals via LinkedIn or your local APMP chapter. Lots of people talk to family or close friends when they don't want to talk to a work person. And if you're desperate for help, you can text 741741 (in the US) or 85258 (in the UK) for support and guidance from trained crisis volunteers.

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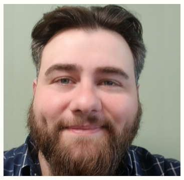


Proposal Reporting

Richard Whiteoak, Technical Support Manager, Privia

There's a real-time proposal status inside Privia that will set you free from emails, phone calls, and bottlenecks. Get started with Privia Reporting.

Question: Can I report on historical activity, like process performance as well?

Answer: Yes, in addition to real-time status, Privia also provides reporting for historical performance, for example to identify outcomes and areas for process improvement. In addition, the server retains information on every activity within an organization’s instance of Privia. Activity reports against the server support security audits and the ability to recreate user actions and provide data recovery.

Question: Can I export these reports into Excel?

Answer: Yes, out-of-the-box and custom reports are configurable to facilitate a nearly limitless variety of data displays and analyses including KPIs, and are exportable to Excel for analysis and massaging into more visual displays.

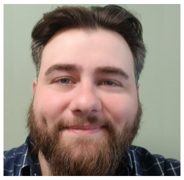
Question: Does everyone see the reports I make?

Answer: With Privia's reporting capability, the team has greater visibility into the proposal process and historical performance. Privia Personas control who can view and create reports, as well as create limited visibility to information. For example, while an Executive Persona may view and create reports, a Contributor Persona is limited to just the Document Management functionality and has no visibility or access to reports. Reports can be shared with everyone in an organization or they can be limited to just the person that created the report.

Question: Can we report on what's happening with Workflow?

Answer: Yes, in addition to real-time status of all workflow tasks and steps, Privia also provides reporting for workflow performance, for example to identify outcomes and areas for process improvement.

Click to Learn More: Warning: Sharing May Not Be Caring, The impact and potential danger of using free file-sharing tools on proposals



Ask ther Expert

Richard Whiteoak, Technical Support Manager, Privia

Have questions about Privia's omni-channel for capture, content and proposal management? Privia's Client Support Team will field questions.

Question: How does Privia integrate with Salesforce?

Answer: Privia's API interfaces with Salesforce for the direct import of opportunity data and synchronization of one-directional and bi-directional data (user choice) between Privia and Salesforce. Most importantly Privia uses Salesforce data to "kick off" our process workflow - which makes collaboration between BD/Sales and proposal teams that much easier, and manual data entry a thing of the past. Privia also integrates with industry-leading opportunity source sites, including FedBizOpps and GovWin, to save time when identifying and importing opportunity details and packages into Privia to jump-start the bid decision and proposal pursuit.

Question: Is the integration with Salesforce automatic or must we push a button to update?

Answer: It is automatic. Privia's Salesforce integration supports the dynamic synchronization of one-directional and bi-directional data (user choice) between Privia and Salesforce.

Question: Can I store graphics in Privia?

Answer: Yes, at its core, Privia is an enterprise content management system, serving as the content source for proposal development. Because Privia is "file agnostic," teams can store and manage access and version control for any type of file uploaded to it, for example documents, graphics, presentations, spreadsheets, templates, and audio/video files. Unlike some other tools, we never "convert" files into our own proprietary format. We let people work with the applications they want, and automate the process around that.

Question: Can I invite external partners to use Privia?

Answer: Yes, licenses can be assigned to a member of a teaming partner or subcontractor organization who is external to the customer's organization. These users have limited (contributor type) privileges including basic document management, activities and alerts. Privia's unique workspace paradigm allows you to quickly set up and secure separate workspaces, as well as sub-workspaces, so you can choose what information is shared with partners. Using our access controls, you can be sure that partners only see what you want them to see.

Question: How many proposal workspaces can we have at a given time?

Answer: With Privia, there is no limit to the number of proposal workspaces at any given time.

Continued...

Ask the Expert, *continued*

Question: Can I start a simultaneous commenting session and leave it open for several days?

Answer: Yes, to achieve simultaneous collaboration in real-time, we have developed "curated commenting" wherein multiple users can comment on the work-product (document, image, spreadsheet, etc.) simultaneously and in real-time, as well as asynchronously, all in the same tool. Simultanous collaboration, or commenting sessions, can be opened and left open for a period of time. Reviewers can see each other's comments in real-time, reply and build off differing perspectives to produce better, more accurate content faster. If a reviewer misses a simultaneous commenting session, they simply login to comment, view the reviewers previous comments, reply and comment on their own.

Question: Does Privia show who has last edited the document?

Answer: Yes, version history on all files includes a date and time stamp, along with the user's name that last modified the document.

Question: Can a task be escalated to another team member?

Answer: Yes, a task may be escalated/re-assigned to another team member and workflow employed to automatically alert that user of their new assignment and deadline.

Question: What is workspace calendar?

Answer: Privia's latest system enhancement, project based event scheduling, is aimed at helping proposal teams improve team engagement and leverage automated workflow tools. The new "Workspace Web Calendar" continues Privia's successful mission to empower efficient proposal management through real-time collaboration. Workspace Web Calendar is a centralized, real-time, at-a-glance "snapshot" of proposal milestones and business-critical notes curated by the proposal manager. Each pursuit, whether that is an opportunity, a proposal, a project, a contract or even a content library, is organized into a customizable and searchable workspace, and each workspace now includes its own customizable Workspace Web Calendar. Privia users subscribe to each dynamically updated workspace calendar they have access to and link it to their desktop calendar (e.g. Microsoft Outlook or Google Calendar).

Question: Is there any plan to create better security options so folks like subs can't save a file or files to their desktop?

Answer: With the changes that we are implementing with the new Web Commenting tool, we are setting the ground work for a potential feature rework where a document could be more tightly controlled in a web based rendering rather than downloading a read only copy of the file. We are interested in pursuing these ideas and are taking them into consideration for future releases.

Continued...

Ask ther Expert, *continued*

Question: Regarding the WEB version lack of ability to use comments - is there an update we are missing or is it something that is being worked on in the future? One of our biggest issues is folks using web-based privia cannot comment during reviews, they have to download and use word to do the commenting then we upload and combine comments at the end of the review cycle.

Answer: This limitation has been our focus in the current development program. With the release of our new Web Commenting feature, reviewers will be able to use any browser - including on their mobile devices - anytime, anywhere, to review and comment on proposal documents. Client software is no longer required, which Mac and Chrome users will love, and the user interface works on Smart Phones or Tablets.

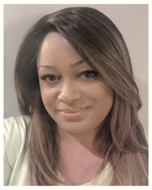
Question: Does Privia handle version control?

Answer: Let us quote a customer - "no content management software handles version control better than Privia - none." Privia provides automatic document Version Control for tracking and managing changes to the hundreds of concurrent documents involved in responding to new business requirements. Previous versions are always available for view by users, and include time and user tracking. Only a designated Workspace owner, typically the proposal manager but user defined, have permission to use the Version Control feature to roll-back to a different version of the document. Privia's Roll-back Version Control is nondestructive, preserving all versions of the document for a complete Audit report. In addition, teams can choose to archive proposal efforts, for example annually by year, and determine whether or not users should be able to access the archive, or a specific proposal in the archive or be able to access the archive through the search feature.

Question: Are there standard reports? Do we learn how to do reporting as part of the implementation?

Answer: Yes, out-of-the-box and custom reports are configurable to facilitate a nearly limitless variety of data displays and analyses including KPIs, and are exportable to Excel for analysis and massaging into more visual displays. Reports training is part of Privia's standard implementation process which takes a train-the-trainer approach to train users and to familiarize all members with the software and your process.

Click to Learn More: Capture and Proposal Management: 9 Things Slowing You Down



Process Automation

NiKole Maxwell, Director, Professional Services, Privia

Proposals; there never seems to be enough time. Learn how to reclaim valuable time with Privia's award-winning Automated Workflow.

Question: Is there a limit to the number of workflows we can have/use?

Answer: No, organizations may design any number of workflows. Using our process workflow tools and using permissions and planning tools within each workspace, we give the proposal management an easy ability to track proposal deadlines, task completion and assignments, team member tasks and contributions and many other aspects of the proposal process.

Question: If we're in a pinch, can we run a proposal without a workflow?

Answer: Yes, automated workflows are not required to launch and develop a proposal in Privia. Our flexible automated workflow capability, including task assignments and email notifications and alerts, is provided to help keep the team in synch and on deadline throught the proposal development process. Honestly though, it is probably a better idea to just develop a rapid response workflow - which can be accessed in seconds - to address this situation. Our Professional Services team can show you how.

Question: Can we have different workflows for different types of bids?

Answer: Yes, organizations may design any number of workflows specific to different types of bids. For example, by team, bid type or turnaround timeframe. In addition, a combination of metadata and workflow provides the tools necessary to monitor and manage re-usable content as it ages to keep pace with proposal team demand.

Question: Can workflows be changed/adjusted mid-proposal?

Answer: Yes, whatever workflow you choose to launch a proposal is adjustable during proposal development. For example, changing an workflow task assignment to a different individual, group or role.

Question: Does Privia deliver any workflows with the system?

Answer: To accelerate implementation, Privia offers eight (8) Shipley-based processes/workflows out-of-the-box to manage various procurements including milestones and tasks. They can be used “as-is”, modified to fit the organization's processes, and used as templates to create new processes using Privia's Process Designer tool. During our rollout we can show your team how to do this easily.

Continued...

Process Automation, *continued*

Question: What's the difference between Automated Workflow and Process Designer?

Answer: Process Workflow is the thing you use, Process Designer is how you set that up. Using Privia's Process Designer tool, you can create and modify automated workflow to automatically do any or all of the following:

- Assign individuals to specific tasks within a workflow.
- Generate a list of activities or milestones.
- Generate a schedule for completion of the milestones.
- Build out a pre-defined folder hierarchy with (optional) document templates.
- Notify individuals or groups.

Whatever approach you choose to define your proposal process workflow, all automated workflow processes include auto notification of tasks and milestone tracking abilities.

Question: Do we have to use Privia's process workflow or can we define our own?

Answer: Organizations define their own automated workflow processes using Privia's Process Designer tool, and Privia provides out-of-the-box workflows and training to get you started.

Click to Learn More: How to Use Fewer Tools and Save More Time

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Storyboarding for Quality

Ashley Kayes, Senior Proposal Consultant, AOC Key Solutions

Your proposal should tell a story. Re-discover how the art of storyboarding keeps your team on message. (APMP Practitioner.)

Question: At what point in the business development process do you recommend storyboarding to occur?

Answer: Ideally, storyboarding will occur before the RFP is released. This allows you to have all of the major solution elements defined so that the outline can be adjusted and you are ready to start writing once you have the final solicitation documents. However, if pre-RFP storyboarding hasn't occurred, I recommend dedicating two of the draft development days to storyboarding before authors begin writing the first draft.

Question: How can you adjust the storyboarding process to accommodate quick turn around task orders?

Answer: For quick-turn proposals, or when you haven't storyboarded before the final RFP release, I recommend including the major storyboard elements directly in the proposal section template. This will streamline the process of transferring the solution information to the section drafts.

Question: When I mention storyboard, my team goes running. What are some ways to gain buy-in?

Answer: One way you can get your team on board is by simply calling it something different. For example, my company calls storyboards "Section Strategy Templates." Similarly, Shipley calls storyboards "Proposal Development Worksheets."

Question: Any templates or tools to reccomend for storyboaring?

Answer: KSI has a template that we use for storyboarding, our Section Strategy Template, which we have included in the Virtual Swag Bag as a free download. What we like about our template is the prompt for required next steps following the storyboard review. Shipley also has a similar template in their toolkit called a Proposal Development Worksheet.

Question: How many people in the team should be involved in storyboarding?

Answer: The number of people involved in storyboarding will vary based on the size of the proposal effort and team. At a minimum, the Capture Manager, Proposal Manager, and each Section Lead/Author should be involved in the storyboarding process. If your team includes separate Solution Architects, they should be involved in the storyboarding process as well. For very large efforts, it can be helpful to include graphic artists directly in the storyboarding process to help the team think more visually.

Click to Learn More: The Story Behind Storyboarding And Why It's Critical To Your Proposal Process

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What's New in Deltek GovWin

Carey Webster, Sr. Director of Research, Deltek

Learn about the latest enhancements, what's to come in the year ahead and how to leverage these to accelerate your government business.

Question: Who are the target users for Territory Manager?

Answer: Usually it's your sales team, but really, it's any company with a large enough group that is divided into territories. It allows targeted searches with results fed directly into the particular team or individual's repository. This creates a turnkey approach when new team members are added or shift territories, so they don't have to figure out how to pull this information together on their own.

Question: Why would a company want to pursue an OTA?

Answer: Well, production contracts can be very large and can create a dependency between your firm and the government, securing continued contract activity into the future.

Question: What is OTA?

Answer: It's a method for the gov't to procure bypassing the FAR in an effort to quickly purchase innovative prototypes from industry

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Legally and Ethically Shape Upcoming Federal Procurements

Shirley Collier, President, Scale2Market, LLC

Learn what the FAR allows and encourages on pre-solicitation communications with the Host of the Growth Masters Federal podcast.

Question: How do I educate government personnel on their responsibility to meet with me?

Answer: Being aware of the FAR parts 10 and 15 is essential. And the OFPP has issued various “myth busting memos” to contracting officials to clarify and encourage pre-solicitation communications. The latest memo was April, 2019.

Question: How much time can I expect to give a capability briefing?

Answer: 15 minutes. But of this time, you should talk ½ of the time and ask targeted questions to get them to talk the other half.

Click to Learn More: Growth Masters Federal: Thinking, Planning and Collaborating to Win Government Contracts

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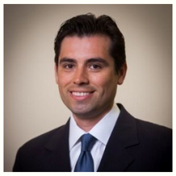

Monitor and Manage your Proposal Content

David Valdez, COO and CFO, Privia

At it's core, Privia is an enterprise content management system. Learn how to organize, manage, and search your Privia Content Library.

Question: Can we store graphics in Privia?

Answer: Yes, at its core, Privia is an enterprise content management system, serving as the content source for proposal development. Because Privia is "file agnostic," teams can store and manage access and version control for any type of file uploaded to it, for example documents, graphics, presentations, spreadsheets, templates, and audio/video files.

Question: What are some best practices when setting up?

Answer: Crafting a proposal is an expensive and time-consuming process and making quality reusable content easily accessilble to your team can save time better invested on responding to unique requirements. Consider your content first; is it quick answers to questions, comprehensive overviews or a mix of both? Depending on what you wish to store and manage, organization is key. Set up a Content Library that is "curated" (someone manages and controls what goes in there). Set up organizational workspaces where you can easily organize your proposal folders. Then consider a content taxonomy to help you organize the storage and to serve up both browsing and searching. Who owns the content? If it's all owned by the proposal team, you are ahead of the game. Unfortunately, the majority of proposal content is owned by subject matter experts across the organization. Establish a network with these SME's, offer to insert yourself into their process to make it easy to secure updates and keep your content library current. Make sure your content is easily accessible to users whenever and wherever they work and avoid the risks of free file-sharing tools. Next, set up Pipeline communities so that BD and Sales people can easily move data into the proposal process workflows. Of course you'll want to set up some workflows right away - make them simple at first and then add to them as you mature their use. Finally, consider how your team works - do you want two different solutions for your team to access for content and proposal development or a single, "one-stop-shop?" A word of caution: a recent buyer survey by Strategic Proposals, the #1 approved training organization by APMP, revealed that "over 40% of bidders should be ashamed of the quality of their proposals." Basically, that meeting the deadline with generic responses is simply not enough for buyers. So we believe that while a content library will help quickly address answers to similar questions, it takes team collaboration to develop the quality content buyers are looking to evaluate and consider.

Question: Can we set auto reminders to remind subject matter experts that content needs updating?

Answer: Yes, for example, you could establish an automated workflow, or series of automated workflows, to notify content document owners when a document needs updating.

Continued...

Monitor and Manage your Proposal Content, *Continued...*

Question: When we onboard Privia, how do we bring in the contents of our content library?

Answer: Using a Content Library is physically quite simple. All you need do is set up a Workspace and assign who (one or more people) will control what goes in there (they "own" the workspace). The key is establishing the process from there. Some clients have set up a "staging area" workspace where anyone can place suggested content and send a notification to the Content Library owner to check it out. If they like it, its a click to move it into Content Library. Then just make sure your teams know that the "best" content can be searched for in the Content Library (our search feature lets you specify where to look - for example, only in Content Library), and that they should look there first. Then just set an alert so that you can remember to review what is in the library on some periodic basis. Easy!

Question: Can we restrict edit access to content in the library so no one can change it?

Answer: Yes, by centralizing content management in Privia, you may restrict edit access to content in the library so no one but who you define as editor may edit the content. For example, if you post a few different Exective Summaries for your team to choose from, perhaps by industry, users would be able to View the documents for reuse, but not edit the documents available to the team in the content library.

Question: Can we establish a staging area for content the team recommends to give us a chance to review and approve before it becomes available for

Answer: Yes, a best practice for setting up a content library in Privia includes the concept of a "staging area" for content in development. For example, the "staging area" folder would be where you and your team could recommend content for inclusion in the content library Workspace. This content would be restricted to just your content management team or specific subject matter experts you define until it was approved for use. At which time, you would provide access to the larger team for use.

Click to Learn More: Even More than Content Management: Proposal Management Software

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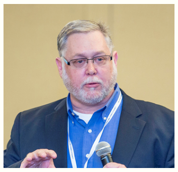

Best Practices: Improving Proposal Skimmability

David Seibert,Trainer, Consultant, Author, The Seibert Group

Almost nobody reads a proposal cover to cover, but almost everybody skims it. Learn five techniques to make your proposals easy to skim.

Question: Can you shorten these intro exec summaries if the page requirement is particularly limited?

Answer: Absolutely. But remember I refer to them as executive introductions, not summaries. I'm not summarizing the section, I'm telling them what they're going to learn from it—what they're going to take away from it—after they're done reading it. I always strive to include the exec intro at the beginning of longer sections, but when faced with restrictive page limits, I've been able to compose it into a single paragraph. Ironically, it takes more time and work to write a shorter intro than a longer one, but it can be done.

Question: You said "almost nobody reads a proposal cover to cover." Where does this fact come from?

Answer: Good question. Part of it's just common sense; who has the time to stop everything they're doing to read five 75 or 100 page proposals cover to cover? I don't. In my training classes, most of my students don't. I was talking with a benefits manager for a municipality. He told me the first thing they do is to quickly eliminate the two or three vendors they know don't make the cut. Of those that make the cut, he said he will read each proposal thoroughly because it's his job to understand everything that's in them. But the other people on the review committee—who for the most part have other jobs and daily responsibilities, who know relatively little about benefits, who were drafted onto the committee (probably against their will)—they hardly ever read proposals in any depth. These draftees generally feel some sense of obligation to the constituents they represent, but typically won't do more than casually skim through the proposals to look for things important to them or that impact them. I recently found a book called Secrets of the Selection Committee. Written by Gary Coover, someone who has been on many selection committees, it articulates the exact same message as my benefits manager friend described above. Make your proposals easy to skim and you'll appeal to more people. It's as simple as that.

Question: Of the five ways to improve skimmability, why are the first two your favorite?

Answer: Of the five ways to improve skimmability that I discussed, my favorite is to use lots of headings and subheadings. My second favorite is to use summary answers prior to each full answer. These two are my favorites because they're both highly effective at improving skimmability, and they're both super easy to do. It doesn't take much time or effort to review a page of text and find places to include headings and subheadings, nor does it take much time to summarize a long answer into a short, one or two sentence summary. When completed, though, it allows a reviewer to navigate through your text quickly and deftly and still understand the message you're trying to communicate.

Continued...

Best Practices: Improving Proposal Skimmability, *Continued...*

Question: Some people in our proposal team believe there shouldn't be photos of the person in the resume. However, a picture says a thousand words. Should resumes have photos?

Answer: I say no. Here's why. Bob is a very talented and experienced engineer. Heck, most of the clients he's worked with describe him as brilliant. However, Bob has a very young looking appearance; he looks more like a fresh-faced intern than a veteran engineer. And, yes, that could be a problem. "Don't judge a book by its cover" is a saying that resonates because, in fact, people do judge books by their covers. If I'm looking for an experienced engineer to oversee an important project assigned to me, I (unconsciously) want someone who at least looks the role. Presented with someone who looks like a summer intern, I may be less inclined to fairly evaluate his abilities. There's lots of psychology that backs this up, and I'd direct you to Influence by Cialdini if you want to read more. In proposals, therefore, I recommend highlighting your team members' skills and abilities, not their appearances.

Question: What is your view of using appendices to include a full case study vs including a short call-out in the body of the document as call-outs?

Answer: A short callout in the body of the document is always preferable to a full case study in an appendix. To put it in perspective, a full case study in an appendix might be appropriate for an academic study of a particular topic, where researchers are willing and engaged to follow all of the footnotes and supporting evidence related to a particular treatise. But this is business. People don't have that kind of time. They're probably not that interested either. Put bluntly, a simple, three paragraph case study that appears in the body of the proposal next to the relevant answer will likely get read. If you refer the reviewer to an appendix to read a more comprehensive case study, it's asking them to do too much work. I know that sounds funny, but it's true.

Question: How do you avoid consistency coming across as boilerplate format? Or is that all right?

Answer: I don't know that I entirely understand the question because, without some context, I view consistency and boilerplate as two different things. Boilerplate content is a great starting point. I love having access to good content that I can then customize to each client. Without that, I'd be writing each answer from scratch every time. That's a profound waste of time. Consistency is a different topic. During the kickoff meeting, I advocate gathering the team to make sure everyone—sales, SME, and proposal writer—is on the same page with the same message, the same tone and the same tenor, etc. This kind of uniformity ensures consistency of message. I hope that answers the question.

Click to Learn More: Proposal Best Practices: A Practical Guide to Improve Your Win Rate When Responding to RFPs (Available on Amazon)

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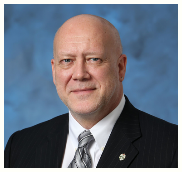

How Good is Your Word Proposal Template?

Dick Eassom, Chief Word Officer, Wordman Speaks

Same old proposal template? Learn how to build a Word template for consistent look and enhanced branding. (CF APMP Fellow)

Question: How do you avoid template consistency coming across as boilerplate format? Or is that all right?

Answer: By template consistency, I am referring to a common look and feel to all your proposals, rather than the reusing the same content in each proposal. There is a legitimate use for some standard content, e.g. an "About Us" section, but proposal content should always be developed specifically for that customer and their needs. But consistent use of your template establishes your brand and demonstrates an attention to detail.

Question: How do you go about creating a custom template for our company?

Answer: Before we start, I ask you to send me your corporate style guide, any sample marketing brochures you have, some examples of previous proposals, and a link to your website. We then have a short kick-off meeting to determine your template requirements, especially any requirements for standard content Building Blocks, etc. I will then create some draft template layouts for your review. Once we have agreed on the final layout, I will complete the template design, create a user guide detailing all the styles and their use, and provide a quick training session via webinar. Each custom template comes with one hour of post-training support to handle any small changes you require.

Question: Do you have to do anything special with a custom proposal template?

Answer: Ideally, you should distribute the template to all users, along with the user guide. The template can easily be saved to a special folder on your PC that will make it available to File > New. This is essential if the template contains any Building Blocks for standard content or any macros.

Question: Do you provide Microsoft Word training?

Answer: Yes! I provide custom Microsoft Word training aimed at proposal development and technical documentation teams—this is a more targeted syllabus than the standard Microsoft Office Specialist. Training can range from a series of one-hour webinars through an on-site all-day workshop.

Question: What happens if we have problems using the template you provide?

Answer: As mentioned above, all my custom templates come with one hour of training and one hour of post-training support to handle any small changes. This reduces and generally eliminates the risk of any problems is using the template. However, if there are problems caused by the template, user guide, or training, I will make sure these problems are fixed.

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10.3

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