



# THE PROPOSAL DEBRIEF



## MESSAGE FROM THE PRESIDENT

### Greetings GMC Members!

*What a long, strange year it's been. I'm not sure I would have imagined when crafting my last letter from the president that we'd still be living through a pandemic this late in the year and still having to navigate all the challenges that come with office shut downs, travel restrictions, and balancing work and life when everything is starting to sort of blend together. Yet here we are. While 2020 has certainly presented new challenges, it's been **inspiring to see new opportunities that have arisen** as well. Whether you've spent time **upskilling, attending virtual trainings/webinars or networking events, used this time to reflect on your goals, your health, your career, or learned which side of the love/hate relationship you fall on with work from home, we're sure you've made the best of these difficult times.***

*I'm inspired daily by the commitment of our members to support each other, by the unending desire of our chapter's board and committee member volunteers to continue to provide relevant content, learning, and networking opportunities for our members, and by the entire APMP community for rallying together and continuing to promote professional development, mentorship, and leadership opportunities for our members.*

### **As we look to 2021, we plan to build on our successes from this year by continuing to:**

- *Expand our virtual member meetups (and hopefully getting back to in person meetups when it's safe)*
- *Offer additional networking opportunities through our Consultant's Virtual Networking Group*
- *Promote certification through our Certification Study Group by offering our Foundation Study Group again and expanding our program to include a Practitioner Study Group*
- *Give back to our communities through our GMC Gives Back initiatives*
- *Support each other through our Mentorship program*
- *Provide relevant and timely learning opportunities through our monthly webinars and our GMC Book Club*
- *Outreach into colleges and universities to introduce APMP to students, grow our membership, and help define the future of our industry.*

**And to accomplish all these things, we need you! If you'd like to get involved with the APMP GMC Board of Directors, we have a few open positions on either our Events Committee or our Marketing Committee. Please contact me or [Andrea Dunger](#) for inquiries or to express interest in participating.**


— [Stacey Duwe, CP APMP | Chapter President](#)




MARK YOUR CALENDAR  
**WE CAN'T WAIT TO SEE YOU!**

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**GMC** *happy hour,*  
END OF YEAR UPDATE  
*and*  
**BINGO**



*Click to Register Now!*

*Save the date!* ♦ Wed, December 9, 2020 3:00 PM – 5:00 PM CST ♦ *Win prizes!*



### Dear GMC

Have you found yourself in a tricky situation or need some proposal-related advice? Send in your queries to Dear GMC and receive proposal best practices and lessons learned from seasoned professionals. Read the column, and other great articles, on the [GMC Blog](#).

Submit your questions to [Dear GMC here](#).

# Managing Your Time When There is No Timeframe

Written By Kati Stutsman

Ever since COVID-19 disrupted business-as-usual life in early 2020, we've all been operating with a "we'll face it as it happens" mentality. Part of it is basic survival instinct: why worry about things you can't change? Part of it is practicality: we receive new information and guidance daily, so why look further than a few days out?

What started as potentially a two-week quarantine is still holding strong more than six months later, and we still don't have definitive answers as to when life will get back to "normal." This uncertainty has caused anxiety for many. For those of us who manage proposals, we're forced to walk a strange tightrope between progress and return on investment.

## Navigating the Unknowns

By nature, proposal managers are problem solvers. It's our job to set and maintain schedules, drive progress, and help win new business. Depending on your company, proposal management may be a stand-alone function, or you could serve a more encompassing business development or marketing role. We often face challenges around schedules, competing business interests, and deadlines. It's our job to offer solutions and advocate best practices that 1) make efficient use of time and resources 2) make sure capture and proposal efforts align with company strategy.

In today's COVID-19 market and climate, your company may be facing some unknowns. Strategic growth plans and capture planning efforts were possibly put on hold due to clients shutting their doors or operations moving online. Maybe your company went the opposite way and decided to pursue as much as possible in the event work dries up in the latter part of this year or 2021. You could even be facing a situation where leadership is encouraging you to stand down while they re-evaluate budgets.

In situations of unknown budgets or re-evaluation of resources, our companies often look to us for recommendations on where to spend time pursuing work. How much effort do we put into something when there is a risk that the project will be delayed or canceled? How confident are we that our intel is correct? Sometimes all we have are best guesses.

## Clients are Uncertain Too

Companies in a wide variety of industries have been affected by the pandemic. For many, their capital planning and budget efforts are dependent on revenue streams that have been hampered by COVID-19 restrictions. From restaurants and hospitality venues to transportation agencies who have seen a drastic decline in ridership as commuters work from home, companies' revenue shortfalls may mean scaling back.

Many of us are in a void of information right now. Projects we've tracked for months have been shelved indefinitely. Clients can't share information with us because they don't have it to give. Where does that leave capture and proposal teams who are responsible for managing their companies' funnels?

## Sample Scenario

Let's say that you've been tracking a major project with Client X for more than six months. Your capture manager identified the opportunity early, has a good handle on opportunity details and competitors, and developed a capture plan that included milestones for meeting with influencers and key decision-makers. Pre-COVID, the plan was to improve our positioning then bring in a proposal lead about a month ahead of the RFP date to work on strategy and proposal development.

*Then, COVID happened...*



# DEVELOP A GAME PLAN

The client canceled all in-person meetings the capture manager had scheduled. More than six months have lapsed and the only information your capture manager has been able to flush out is that the project has been delayed due to funding... but the client has indicated they still want to release the RFP in 2020.

As a proposal manager, what do you do?



## Managing Your Time When There is No Timeframe (Continued)

**1** Do nothing. There is no guarantee that the RFP will even come out and it sounds like the capture manager still has work to do.

**Risk:** The RFP will drop and your team is not well-positioned. It could mean some late nights and compressed timeframe if your company decides to pursue it.

**Benefit:** You don't waste time, resources, or money pursuing something that may not materialize.

**2** Move forward with developing the proposal. Jump back in the mix and develop your strategy. Especially if it's a client that you've worked with before and you can make some assumptions about format and requirements, maybe it makes sense to develop a proposal. Get the document as far as you can before putting it on the shelf while you wait for the RFP.

**Risk:** The RFP may be delayed for months or, even worse, the project could be canceled. Again, this could be a waste of company resources.

**Benefit:** If the RFP does go live, you can jump straight into revising and refining based on requirements. You'd be ahead of the game.

**3** Complete some action items, then pause your efforts. In collaboration with your capture manager, identify some concrete action items that can be accomplished ahead of the RFP. Maybe these are related to storyboarding, developing resumes and project sheets, or fine-tuning the solution. Once materials are in a comfortable place, pause your efforts until the RFP.

**Risk:** You're taking a calculated risk here. You're spending resources on the pursuit but in a limited capacity.

**Benefit:** You won't be at zero when the RFP goes live.

When faced with a lot of unknowns, Option 3 possibly makes the most sense. You're being a responsible steward of your company's resources while also bringing some solutions to the table. This is a good balance on the progress vs. return on investment tightrope. It also makes you an integral part of your company's business development strategy and gives you a voice in the process... rather than reacting to whatever is dropped on your plate. Be an advocate for how you spend your time!

Answering the "What do we do next?" question in times of uncertainty can be tough. It comes down to making strategic decisions for how best to utilize your time and talents. As we like to say – work smarter, not harder.

Check out the following resources for more suggestions, tips, and tricks in effectively managing your time:

[15 Time Management Tips for Achieving Your Goals](#)

[Check out these APMP webinars](#)

### ABOUT THE AUTHOR

*Kati is a certified proposal specialist in the Architecture/Engineering field. She leads the development of priority and strategic proposals in her office's Great Lakes region, which includes opportunities in Chicago, Indianapolis, and Detroit. Kati leverages her background in communications and journalism to identify and articulate solutions that meet client needs. Past experience in marketing content development, photography, and graphic design all play a role in her approach to creating dynamic proposals.*

# Certification Study Group Success!

The APMP GMC started advertising the Foundation Level Certification Group in early January 2020 and opened the program up to 10 participants. Study sessions began in June and ran through August, for a total of six one-hour sessions with seven participants. Led by chapter chairs, Lindsay Lange and Kaitlin Koussaie, the team met every two weeks and covered five chapters in each session. This allowed participants enough time to read the chapters in the Foundation level study guide.

Each session included a warm up, a lecture that reviewed chapter notes, and important takeaways. Organizers shared insight/experience gained from taking the exam. The team met via Microsoft Teams to provide a more personal, yet relaxed atmosphere where everyone could interact together. After initial feedback from the participants, Lindsay and Kaitlin added sample questions and discussions on what types of questions to expect on the exam.

**6**  
SESSIONS

**7**  
PARTICIPANTS

**All**  
PARTICIPANTS  
WHO HAVE  
TAKEN THE  
EXAM PASSED!

**JOIN US IN 2021!**

We're hosting another Foundation Level Certification Group in 2021 and will be adding a Practitioner Level Certification Group. The two groups will meet at separate times during the year. Interested participants will need to complete eligibility criteria to earn one of the designated spots. Stay tuned for more details!



# Certification Study Group Success! *Continued*

We asked some of the study group participants to give us their feedback, tips and tricks they learned along the way, and their overall experience. Here's what they had to say.

## Q: Why did you want to be Foundation certified?

I wanted to show my commitment to my craft and position at my company; to have a professional certification from an organization like APMP is important to me.

- Grant Willsie, CF APMP

In my journey as a proposals manager, as I develop my real world experience, I thought it was important to also build my credentials by achieving the certification. It is also a great opportunity to network with new people who have a common understanding of the proposal world.

- Sonali Oberg, CF APMP

## Q: How did the study group help you prepare for the Foundation exam?

I enjoyed how Kaitlin and Lindsay set-up each weekly meeting through a lecture, example test questions, and scenarios. Having a mix during the hour session was meaningful, as it allowed us to have a more rounded conversation as we were learning.

- Sonali Oberg, CF APMP

The study program was FANTASTIC. Kaitlin and Lindsay did a wonderful job of putting together the sessions that spanned over the summer. They really put a lot of thought into what content we'd cover in each session, typing out study guides for us, getting the actual Foundations book to us in the mail, talking about the online Body of Knowledge (BOK) resources. All of this helped me prepare for the exam in a way I could not have before. As a writer, multiple choice tests scare me, especially timed ones, and they did so much to set us up to succeed!

- Grant Willsie, CF APMP

Lindsay and Kaitlin provided a lot of value. Specifically, they started class with sample exam questions and emphasized the importance of numbers from the study materials. They even made us do math—in public—to prepare us for those numerical questions that are sometimes tossed into the mix. This group wasn't what I expected. It was what I needed. And so much more.

- Nichole Reber, CF APMP

## Q: How do you feel now after taking (and passing) the exam?

GREAT! I passed, and I'm happy I got it out of the way!

- Grant Willsie, CF APMP

Relieved that I passed! Don't hesitate and wait, take the test right away, as the information is fresh in your mind!

- Sonali Oberg, CF APMP

My study partner and I met online and took the practice exam together. Afterward, when "PASSED" flashed up on our screens, relief flooded in. We were now prepared for the real thing. A week later I took the test. And passed, because I was prepared!

- Nichole Reber, CF APMP

## Q: Any tips or tricks you would share with others studying or planning to take the exam?

- » **Focus on understanding the concepts** laid out in the book so you can apply them on the exam.
- » **Tab your study guide** through a color-coded system that matches your notes/makes sense to you. Funny enough, I [Grant] had a set of "Anne of Green Gables" tabs with characters from the book, so I used my knowledge of their character profiles, i.e. – serious, not as serious, etc., to tab out my book. I think others used colored tabs which is more traditional and logical!
- » In written notes, putting the page number **FIRST** so you can quickly find it in the book.
- » **Use the Glossary of Terms** - this was extremely helpful in taking the exam.
- » **Create a cheat sheet** from the important sections of the study guide, which I thought the test would focus: charts, percentage numbers, graphics, knowing the process of business development, and following the study guide priority list.
- » **Take the practice exam!** 75 questions in 60 minutes is a lot of ground to cover in a short amount of time. The pacing of the practice exam was very useful in understanding if I had enough time to finish and review some questions at the end.
- » **Read the questions carefully!** I read them out loud so I understood exactly what they were asking - some are a little tricky. Also, flag questions you don't know immediately and go back and review them, but always put a "gut" answer in, just in case you run out of time.

- Grant Willsie, CF APMP

- Sonali Oberg, CF APMP

- Nichole Reber, CF APMP

# We asked and you answered!

Participants share their experience with the 2020 GMC Mentorship Program

“ There is ALWAYS more to learn. Always someone out there with a better skill set, better insight, better ideas. I want to learn from them! ”

-Sheri Lytle



Interviewed: Sheri Lytle (mentee)

## Why did you decide to join the GMC Mentorship Program?

Like so many others, I never had any idea that I would end up as a proposal consultant. My team is pretty much the same. We all somewhat fell into this and came to this team from other parts of our company. I realized that my team had a somewhat limited perspective of what this industry does and I wanted to learn what other practices were out there. Also, as I had only been doing proposals for about two years, I really wanted to have someone who could help me work through my challenges.

## What activities have you been doing with your mentor/mentee?

For the most part, for our sessions, I review something from the BOK in preparation for the certification. I jot down questions as I'm reading, then we discuss. Often I ask her for real-world examples of what I'm reading and she is always able to offer insight and clarity. Other times we'll discuss how to improve my writing, how to manage the bid team, or other industry best practices. (And sometimes we just get to chatting about our day or lives and before we know it our time is up!)

## Is there anything you learned or discovered about yourself during this process?

YES! I love to try to come up with "benefit statements" and "Win Themes" (although I'm still working on the latter). I also rediscovered my love of both learning and training. As I learned new skills and ideas, I was excited to share them with my team!

## Why do you think mentorship programs are important?

Because there is ALWAYS more to learn. Always someone out there with a better skill set, better insight, better ideas. I want to learn from them!

## Any other insights you want to share?

Heather [Finch] is more than just a proposal mentor. She has helped me shape and mold what I want my future to look like in proposal management. For a long time I was the "new guy" on our team (technically I still am, we have very little turnover) but I am now seen as the "go-to" person for questions on proposals as well as a SME on a large portion of our content.



It can be very personally fulfilling to know that you've directly contributed to someone's **growth and development**. Seeing your mentee succeed as result of your input is a reward in itself.



[Mentoring](#)  
[A Mutually Beneficial Partnership](#)  
[MindTools.com](#)

## We asked and you answered!

Participants share their experience with the 2020 GMC Mentorship Program (continued)

*Interviewed: Heather Finch (mentor)*

### Why did you decide to join the GMC Mentorship Program?

*I volunteered to mentor thinking it would be a good opportunity to share my knowledge as a leader and grow my network a bit, which are certainly worthy endeavors, but what I have gotten out of it is infinitely more. Sheri is passionate, enthusiastic, and hard-working, and her success motivates me to seek out the opportunities to develop my own career. To think that I could be involved in her accomplishments in any way is an amazing feeling (thought she definitely gets all the credit!).*

### What makes a successful mentor/mentee partnership?

*One thing I think is critical to a successful mentoring relationship is a mentee who comes to the table with a vision for what they want. I think for some this may be a challenge, but Sheri [Lytle] brought it. That doesn't mean that a mentee needs to have a formal agenda for every meeting, sometimes it is nice to have an opportunity to catch up on the chaos that is proposal management, but that internal motivation is what helps drive the relationship forward.*

*Interviewed: Jessica Couloute (mentee)*

### What is your biggest takeaway from this mentorship program, what did you do and how did it impact you?

*Having this mentorship has been so assuring. The beauty of having a mentor who is a professional in the same field, is that it allows you to have candid conversations surrounding all aspects of the job. My mentor and I have had fruitful discussions about goals and industry best practices; but the areas where it feels most valuable is when we get to talk openly about real-life challenges at work such as: coping with burnout, the importance of time off, navigating corporate environments in a pandemic etc. Not only can you speak more openly with your mentor (in comparison to how you might with internal peers within your organization), but you can gain objective feedback to help you conquer everyday hurdles that you may encounter on the job.*



Interested in becoming a mentor or mentee in 2021? Contact [Hayley Watkins](#) and be on the lookout for applications to open in January!"

6

PARTNERSHIPS

4-6

HOURS PER MONTH

8

CEUs

8

MONTHS OF LEARNING



## MEET THIS MEMBER | Caryn Kent Dean

*For 23 years Caryn Kent Dean has worked as a proposal writer and manager for corporate and government bid opportunities. She has been a proud member of the APMP for six years and supports the APMP Greater Midwest Chapter as a chair for the Consultants Virtual Networking Group.*

*Caryn took her first job as a proposal writer with a young library management system software company after finishing her Masters of Library and Information Science in 1997. The proposal management industry is always throwing new challenges Caryn's way, and this remains one of the most fulfilling aspects of the job. The combination of writing, project management, and working with a variety of professionals keeps each project interesting and invites new ways to grow and learn. As a business owner, she is passionate about creating opportunity for her clients and other proposal professionals.*

*When she's not in the office, Caryn loves to unwind by reading, watching movies, cooking, and creating custom quilts for friends and family. Her favorite movies include just about anything with Judy Dench, Helen Mirren, Emma Thompson, or Maggie Smith and when she needs a little inspiration, Caryn turns to podcasts by or with Dr. Brené Brown.*

*In becoming a consultant and starting her own business, she has been able to spend more time with family, including her husband of 18 years, three kids, and rescue pup, Scout. One of her family's favorite pastimes includes heading to their 55 acre property in NW Illinois to unplug and enjoy hiking and exploring the nearby creek.*

*Creating a virtual working space has also allowed Caryn and her family to take advantage of their acreage as the ultimate social-distancing retreat. While her kids can spread out and spend time in nature, Caryn can work and enjoy a gorgeous view of rolling fields – with a few cows instead of cubicles.*

*Aside from her talents in the proposal industry, Caryn has played the violin since she was eight years old, lived in Italy during her sophomore year at Loyola University of Chicago's Rome Center, and is an advanced Open Water and Nitrox Certified Scuba Diver.*

*In 2001, she travelled with her husband and a group of friends to Truk Lagoon in Micronesia, staying on Truk Odyssey liveaboard for a week. While on their trip they explored World War II history, diving the shipwrecks of Operation Hailstone, and enjoyed front row viewing of the local sea life.*

*In both her professional and personal life, Caryn takes much inspiration from her father. His motto, "if it is to be, it is up to me," reminds her of the power of her will and the importance of seeking validation from oneself in difficult times.*

*Dean kids at Dittmar's Corn Maze in Elizabeth, IL, 2019*



*Scout at the land in Scales Mound, IL with a hot air balloon floating by, 2020*



*Getting ready to dive Truk Lagoon, Micronesia, 2003*



# CONTACT US

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## IMPORTANT ANNOUNCEMENTS!

### Calling All Content!

*We want to hear from you! If you have ideas for webinar content or would like to present, contact [Nichole and Sonali](#) with your ideas. In addition to providing informative and relevant content to our members, you can receive Continuing Education Units for your contribution.*

### Open Board Positions

*Want to get more involved? We have 10 openings on the Marketing Committee, 10 openings on the Events Committee, and searching for a Webmaster Co-Chair. [Contact us](#) if you are interested or need more details!*



## GMC Happy Hour, End of Year Update and Bingo!

Wednesday, December 9, 2020  
3:00 PM - 5:00 PM CST