

# How does your **PERSONALTY** influcence the way you work

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PG 9-11 // News, Events, and More Contact us + more about the chapter We often hear you must have a certain "type" of personality to navigate the challenges of proposal management. One of the most important skills to master is finding successful ways to work with various personality types. Explore why understanding personality types matters in this business and how to better leverage this awareness.

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# THE PROPOSAL DEBRIEF OUARTERLY NEWSLETTER OUARTER ONE // MARCH 2021

# MESSAGE FROM THE PRESIDENT

### Andrea Dunger, CF APMP Chapter President

Andrea has more than 10 years of proposal management experience and is a longtime supporter of APMP. She is APMP Foundation certified and has been serving the APMP GMC board in multiple capacities since 2012. She's involved with the organization and invested at the chapter level because she believes APMP helps instill best practices among the industry and provides networking opportunities with other proposal professionals you can't get elsewhere.

### Greetings!

Here's hoping 2021 is off to a happy and healthy start for all Greater Midwest Chapter (GMC) members and your families! I want to thank our membership for continuing to exhibit we truly are the best APMP chapter. This is evidenced by our continual growth – we had more than 700 members at the end of last year. Let's keep the growth movement going!

As you know, we started several new initiatives in 2020, which we plan on continuing and growing in 2021. We want to keep bringing our members great opportunities and initiatives to continue enhancing your understanding and development of our profession, as well as encourage those around you who may not be a part of this wonderful organization to consider joining.

Many of you probably share in my disappointment: we were not able to bring you our annual symposium in 2020 due to the pandemic. This will change in 2021. We are making plans to host the symposium virtually, which I personally find very exciting! Many of you enjoyed the year-end event with KC Crew, and we are exploring ways in which we can do similar quarterly events to increase your participation in our chapter. We will also be hosting virtual meet-ups this year, so please take advantage of these great opportunities. You can keep up-to-date with these initiatives, as well as our monthly webinars, throughout the year on the GMC website and via email communications.

Another way that you can become involved with the chapter includes joining our committees. We are always looking for committee members and will not turn you away! By joining a committee, you are offered a great look at how our board functions, providing food for thought if you would like to get involved with the board in the future. Additionally, we have great articles on our chapter website and would welcome your contributions there as well.

Our chapter mission is to provide **value to each member** through impactful content, professional development, and networking opportunities. We **want to hear from you** if you have any ideas on what you would like to see (and HEAR) from us in the coming year.

Wishing you the best in 2021!

Andrea Dunger

Andrea

How does your personality influence the way you work? Have you explored personality types with your teammates? Whether you're collaborating in-person or remotely, **consider incorporating personality typing into your teambuilding activities.** 

### Why Understanding Personality Types Matters in Proposal Management

Personality is commonly understood to refer to the thought patterns, feelings, and behaviors making us unique. When we recognize those hard-wired traits, we can understand our motivations and relationships. Using common personality frameworks as a guide, we have a **common language when interacting with others allowing us to understand why they do the things they do.** 

A typical business development team could be comprised of executives, sales leaders, capture managers, proposal managers, proposal coordinators, writers, and graphic artists. Responsibilities may range from high-level strategy and solution development, project management, writing, production logistics - all requiring specific skills. Additionally, personality and talent affects which roles come naturally and where we excel. Personality also affects how we interact with others. Some people dominate conversations and others quietly absorb information during meetings to follow up. When accepting assignments, some people prefer detailed instructions and others thrive when given the opportunity find their own way to meet the goal. When we understand our teammates' natural preferences, we can adjust to each other and communicate more clearly. When we're on a proposal deadline, we need to **reduce opportunities for** miscommunication and maximize teamwork efficiency.

# know thyself

how understanding personality types can lead to more effective proposal management

**By Karin Olson Held, CP APMP** Fargo, North Dakota

APMP GMC Book Club Chair

### **Common Personality Frameworks** Myers-Briggs Type Indicator

The Myers-Briggs Type Indicator (MBTI) questionnaire was developed by Katharine Cooke Briggs and Isabel Briggs Myers and is based on four psychological functions identified by Carl Jung. Those four functions are introversion/extroversion, sensing/intuition, thinking/feeling, and judging/perceiving. There are 16 types, identified as four-letter abbreviations. Many free versions of MBTI tests are available online, in addition to the more in-depth, paid version. Here is a brief, general overview of the functions with their abbreviations:

> Introversion (I)/Extraversion (E) refers to how a person prefers to engage and where they get their energy.

Sensing (S)/Intuition (N) refers to how a person prefers to take in information. Do they use their senses or draw conclusions from their observations?

Thinking (T)/Feeling (F) refers to how a person makes decisions and deals with emotions. Relying on reason or feelings, they consider different information.

Judging (J)/Perceiving (P) refers to how a person prefers to work and make decisions. Often misunderstood as either judgmental or perceptive, this function instead describes the difference between preferring to have decisions made and preferring to remain open and flexible.

Beyond the 16 type descriptions, we can go deeper by learning about role groups, cognitive functions, and how different types interact in relationship with one another.

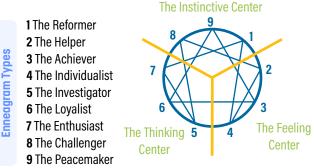
### Enneagram

ggs Types

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The Enneagram is a framework of nine types, depicted around a circle with intersecting lines, and offers a way of understanding how people look at the world differently. Helping people identify their inward motivations, the Enneagram provides language for why people think, behave, and react the way they do. Identifying Enneagram types may not always be pleasant because of the perceived focus on weaknesses. Some practitioners advise

while reading the type descriptions, the one causing the most discomfort may be the type to focus on. But when we peel back the layers, we can learn more about why we do what we do. The nine Enneagram types are:



Take an online Enneagram assessment (enneagraminstitute. com offers a good one) or read through the type descriptions to see which one resonates most strongly. A person has one main type but may also have gualities from the types on either side, or wings. Going deeper into the types, arrows of integration and disintegration reflect qualities of other types during times of health and stress.

The Enneagram offers a framework to really examine ourselves, and when used as a shared language with colleagues, can help identify what drives each of us to improve our collaboration.

### **StrengthsFinder**

While some personality frameworks focus on problems, StrengthsFinder identifies talents and emphasizes strengths. Developed by Gallup over 20 years ago, it uses positive psychology to encourage strengths development. The creators originally envisioned StrengthsFinder being used by teams within workplaces, but the concepts are applicable in all areas of life.

Through the online assessment, StrengthsFinder identifies the top five talents, or strengths, across 34 themes. Those themes are grouped into broad categories such as executing themes, influencing themes, relationship-building themes, and strategicthinking themes. StrengthsFinder also includes the Strengths Insight and Action-Planning guide to help people identify specific action steps related to their strengths.

When working within a team where we know others' strengths, we can encourage growth in one another and align responsibilities to strengths when possible. StrengthsFinder 2.0 by Tom Rath is the current book, which comes with a code for the online assessment.

The GMC Book Club will read *Reading People: How Seeing the* World Through the Lens of Personality Changes Everything by Anne Bogel in the second guarter. The book provides an overview of these common personality frameworks (and more)

with enough detail to help readers identify what theirs might be, along with suggestions for how to use their new understanding of personality. Join the discussion to share how personality insights affect how we interact with teammates, approach our job responsibilities, and grow in our personal and professional lives. See Page 10 for Book Club details.

Karin is a proposal manager with Noridian Healthcare Solutions, LLC in Fargo, North Dakota. With 16 years of experience in federal, state, and nonprofit proposals, she currently works in the health care industry. Her experience includes proposal management, writing and editing, and internal process development. She enjoys mentoring new proposal professionals and implementing industry best practices. An active member of APMP, Karin has attained APMP Foundation and Practitioner Certifications and serves as the GMC Book Club Chair. She was recognized as a member of the 2020 class of



APMP 40 Under 40 award recipients. Outside of work,

Karin loves to read, knit, and camp with her family. You

can reach her at karin.olsonheld@noridian.com.



### Have a question? Submit it through our online form HERE!

### Dear GMC,

I just read your column on Continuing Education Units (CEUs) and it piqued my interest in becoming certified. I started looking around, but now I have more questions than answers. What level should I try to achieve? How do I study? Where do I take the test? How much will it cost? Where do I even get started? Can you tell I'm overwhelmed? Please help!

Sincerely, Certifiably Overwhelmed

### Dear Certifiably,

Take a deep breath, my friend! Let's help you get on the path to certification success. Thanks for reading the Dear GMC column on earning **CEUs**. I'm glad it got you interested in learning more about certification. Of course you don't need to worry about those CEUs until you've passed your test, but it is worth considering. APMP certification is not a one-time thing — it's a long-term investment in your career and in developing your skills as a proposal professional.

Your first stop should be the <u>APMP Certification</u> <u>Program page</u>. Here you will find an overview of the different levels and a current price list. Everyone has to start at the Foundation level, but you should go as far as your interest and experience allows.

Next, think about how you might want to pay for the exam. If your employer offers reimbursement for certifications, the APMP Certification Program page offers resources to help you make your case. As a GMC member, you might also consider signing up for the <u>study group</u> next year. The group will not only give you access to great studying materials and buddies, but your exam cost will be covered, as well. There are also <u>tips and resources for studying and taking the</u> <u>Foundation-Level Certification</u>, as well as the other levels. Here's where you have lots of options: exams can be taken in person or online, you can purchase study guides, attend classes, or just rely on the <u>Body of</u> <u>Knowledge</u>. There's even a <u>sample exam</u> to help you.

Of course, one of your best resources are your fellow APMP members! They can share ideas and tips, or maybe even be an accountability buddy during your journey to certification. Not sure where to find an APMP friend? Join us at an **upcoming event**. I hope to hear about your success story soon!

#### Heather Finch, CF APMP // Dear GMC Columnist

Just a little disclaimer: The advice offered in this column is intended for informational purposes only. Use of this column not intended to replace or substitute for any financial, medical, legal, or other professional advice. This column, its author, and APMP GMC are not responsible for the outcome or results of following any advice in any given situation. You, and only you, are completely responsible for your actions.

### certification SUCCESS STORIES

Getting involved in APMP GMC's study group was the trick for me. Learning how the exam was structured and written gave great relief to us participants. We benefited from learning about how others use parts of the proposal process that our firms don't. One unexpected bonus was making connections and forging friendships. - Nichole Reber

Take the practice exam! Since it's 75 questions in 60 minutes, that's a lot of ground to cover in a short amount of time. The pacing of the practice exam was very useful for me to ensure I had enough time to finish, and review some questions at the end. – *Grant Willsie* 

I was fortunate to have a study buddy when I went through the certification process for Foundation and Practitioner. It was helpful to discuss my questions, fears, and concerns and it's relieving to know someone else understands the rigors and stresses of studying. But, I wish I would've spent more time learning the business development lifecycle (BDL). It was very overwhelming to learn, but once I understood all the phases, it unlocked the doors for other concepts. - Lindsay Lange

Heather first encountered the acronym "RFP" when seeking ways to diversify funding sources for a human services company in 2012 and hasn't looked back. Since then, she's led proposal teams in both the commercial and government sectors, refining processes and developing efficiencies along the way. You can reach Heather through the **Dear GMC form.** 

# WARNING! STRONG LANGUAGE Deal with it.

**By Mercedez Thompson, CF APMP, Shipley BDC** Jeffersonville, Indiana

Recently, I attended a review meeting run by a proposal specialist I had mentored the year before. She facilitated the meeting competently and her proposal was impressive. Yet, when it came time to review the action-item list, I noticed a palpable change in her voice, language, and confidence level.

Three technical narratives assigned to a single author were missing, which meant two deadlines had come and gone unanswered. "Sorry, but I don't have these narratives yet," she said, her cursor hovering and her voice wavering. The responsible author chimed in, "Yeah, I've been swamped. I haven't gotten to them yet." She replied it wasn't a problem, then casually continued down her list.

Assertiveness can be a challenge for marketing professionals for several reasons. At many firms, marketers are still viewed as administrative personnel with little authority. Even at firms where marketing skills are prized, proposal staff are likely up against gender, experience, and/or age biases. After all, it can be difficult for a younger professional with two years in the industry to firmly request an assignment from a colleague who has been with the firm for two decades and may hold an executive title. Then, there's the precarious relationship between the proposal manager and the technical lead of the proposal. Oftentimes, these roles are not clearly defined, and proposal development becomes a dance between colleagues trying not to step on each other's toes. Any of this sound familiar?

Mercedez is a proposal manager at Michael Baker International and a consultant for Elevate Marketing Advisors. She has more than nine years of experience in writing and marketing for diverse industries including engineering, education, and law. Additionally, she taught English courses at Indiana University-Purdue University Indianapolis and University of Nevada, Reno. Contact her at 440-328-6471 or mercedez.thompson@mbakerintl.com or subscribe to her blog at simplywritingblog.com. Sure enough, a follow-up email went out that afternoon. The missing narratives were listed in the action-item list but without a new deadline. In a separate email, my mentee wrote to the responsible author: Sorry, just reaching out to check on these narratives again. When did you say you could have them to me?

All too often, we apologize for doing our job. We are overly polite. We justify our recommendations with babbling explanations and then add on a feeble question like "Don't you think?" or "You see what I'm saying?" Our favorite words seem to be "just," "feel," "sort of," and "might."

What's the result of this weak language? Is it that big of a deal? **Yes.** 

Weak language dilutes our message. It makes others doubt our credibility. And it gives the impression we are indecisive or unqualified.

Conversely, assertive language affords marketing professionals respect from their colleagues. It can **foster attentiveness, boost credibility, and increase authority**. Most importantly, **assertive language can be used respectfully in a way to affirm your and your colleagues' areas of expertise.** After all, they are the experts when it comes to doing the work. You are the expert at getting the work.

So, where can we start?

First, identify where you are using weak language, being overly polite, or apologizing unnecessarily. Is it during meetings? Emails? Over the phone? When deadlines are approaching?

Then, begin replacing the weak language.

### **REPLACE WEAK LANGUAGE**

### DON'T APOLOGIZE

"I'm sorry, but.." "I was thinking..." "Maybe we could try..." "I'm no expert, but.." "Just checking in..." "No worries."

- **DO** USE ASSERTIVENESS
- "I disagree. Consider..."
- "I recommend..."
- "My experience suggests..."
- "I am confident that..."
- "I'm following up on the status of..." "You're welcome."

Other examples of assertive language you might try include:

Who will be responsible for this action item?

*To meet the requirements of the schedule, I'll need this item by...* 

At this point you've missed the agreed upon deadline. When is the earliest you can have this item to me?

I believe this is the best approach.

Any content or revisions received after pensdown are not guaranteed to make it in the final document.

Thank you for your patience.

Remember, **language is important, and words matter.** How you communicate impacts working relationships and company culture.



# LAYING A FOUNDATION OF **TRUST**

Trust is a prerequisite for a successful and effective proposal team. When trust is absent, team engagement is low and the proposal process may seem stressful and pointless. A lack of trust within a team can result in missed submittal deadlines and proposal rejection or loss. A system of trust improves the overall team morale, leading to a productive and fruitful collaboration.

There are four basic ways to gain and keep your team's trust:

**Communication** // Many tend to avoid over-communication, but, in our field, a single email can save a day's work. Clear communication can reduce errors and reinforce expectations missed during kickoff and review meetings. Weekly all-hands meetings, daily status emails, and phone calls for clarification can be implemented to ensure the team things are running smoothly. Transparency // Communication must not only be consistent – it must also be honest. Full transparency about your capacity to take on a task or meet a deadline is important in building trust. Transparency shows the team you are committed and engaged.

**Consistency** // Consistency is the simplest way to build trust. Following through and doing what you say you'll do cannot be occasional actions. Arriving to meetings on time and sticking to internal schedules and client deadlines shows your team

they can count on you. A disconnect between our words and our actions will diminish confidence.

### **By Loni Hawks** Proposal Manager Chicago, Illinois

Accountability // Mistakes happen. Even when trying our best, things don't always go as planned. How we move forward and grow after conflict or error will define our dependability. We must hold ourselves and others accountable and encourage honest feedback.

Building trust takes effort and time, but it goes a long way. When laying the foundation for a strong successful team, the first brick must always trust.

Loni is a proposal manager at Ardmore Roderick, one of the largest minority-owned engineering firms in the Midwest and one of the top 20 largest engineering firms headquartered in Illinois. She's a fitness enthusiast who enjoys hiking with her husband, boxing, and sketch comedy writing. Contact her at **lhawks@ardmoreroderick.com**.

# meet the member brittony martin, cp apmp

Brittony is an Iowa-based principle proposal manger for Collins Aerospace and an APMP Certified Practitioner. She oversees pursuit teams who sell aerospace products, primarily to military and aircraft manufacturing clients.

Like many APMP GMC members, Brittony didn't start her career in proposals. For more than 10 years, she was a successful marketing manager responsible for executing marketing strategies and training sales professionals. After moving all over the country, she and her husband fell in love with the Midwest and settled in Cedar Rapids. At the time, the job market was tough and she found herself "going places where you know people" to find a new role. A connection in her network helped her obtain a procurement position at Collins Aerospace. After six years as a buyer, she transferred to their capture team in 2010 and started her first proposal management role. She has been leading pursuit teams since. The capture team at Collins Aerospace

bases their practices on Shipley Associates methods, and Brittony was encouraged to join APMP as soon as she was on board. She obtained her APMP Foundation Certication within her first year as a proposal manager and has remained actively involved with APMP.

Brittony's success in proposal management can likely be attributed to her love of checklists. Her team has developed standard checklists to confirm compliance, quality, and customer messaging before submitting proposals. She also urges the importance of keeping a high-value content library up-todate to use as a resource during proposal development.

Brittony is planning to retire within the next year, and when asked to give advice to brand new proposal professionals, she encourages how important it is to make subject matter experts/technical personnel feel like you are on their team. When team members know you are on their side, will make them look good, and have patience with them, they become willing pursuit supporters.

Outside of proposal life, Brittony is engaged in Big Brothers Big Sisters of America. For the last eight years, she has mentored a little sister and they regularly try new hobbies together. She is also a life-long artist and has recently started a side business selling her paintings. When she isn't trying her hand at baking new items, painting or winning proposals, Brittony spends time with her five grandsons or has her nose in a good book – ideally a lighthearted novel with a female hero or detective story.

Get to know Brittony! Contact her at brittony.martin@gmail.com or check out her art website at brittonymartinartist. com for more information.

Interview and Profile By Becky Petty & Alexa Ramsey, CP APMP







painter. amature baker. loves a good mystery.

# APMP GMC EVENTS + WAYS TO GET INVOLVED

# call to action!

### **Local Engagement**

Are you familiar with our chapter's <u>local meetup program</u>? This year, our goal is to have a local meetup in each of the 12 states we support. Hosting a local meetup is very simple! We provide invite templates and planning support. The chapter is also proud to offer \$20 per attendee to cover food and beverage (non-alcoholic) costs and \$50 for a guest speaker. However, virtual local meetups are recommended until the weather allows for outdoor gatherings. If you would like to host a local meetup in your state, please email **localmeetups@apmpgmc.org** to get started.

### **Monthly Webinars Series**

Webinar series chairs Sonali Oberg and Nichole Reber are always looking for topics of interest. We also want to hear from new voices. If you have a topic you want to learn more about, or if you want to speak or suggest someone who would be a good presenter, reach out to them at **chicagowriter1@gmail.com**. Meanwhile, watch for news about webinars on leadership, getting buy-in for your proposal department, and diversity.

### **College Outreach Program**

The purpose of the College Outreach program is to educate students on the proposal profession, the skills needed to be successful in the role, and resources to help students find an internship or entry-level position. Interested chapter members can help us by recommending their alma mater along with any college/university contacts so we can target schools to engage with. Additionally, if you have internships or entry level positions open at your organization, please share them with program chairs Maddie Redman and Dena Stukenberg so we can include the information in communications to students. Please email them both at **stukenbergd@bcbsil.com** and **madeleine\_redman@bcbsil.com**.

### **CALENDAR OF EVENTS**

For more information about upcoming events, including our 2021 Symposium, visit us online at <u>apmpgmc.org/events</u>.

# YOUR APMPGMC COMMUNITY

GMC is proud to encourage, foster, and facilitate networking and developing opportunities among our members. We may be 12 states strong but, as we all know, it's a small world. And while we celebrate our differences, there is also much connecting us. Check out some of our active programs, as well as opportunities to collaborate.



### **Consultants:** Opportunities to Feature Yourself or Small Business

While many proposal professionals are embedded within large and small organizations, some marketing and proposal professionals act as independent consultants or operate small businesses. We want to help consultants in the GMC network who are open to new opportunities, clients, or projects. Check out the below options – we'd love to get to know you and possibly feature you in an upcoming newsletter.

### **Consultants Virtual Networking Group**

Join our **Facebook group**! Proposal consultants are passionate about supporting clients in their pursuit of new business. However, this path can be a lonely one. Our goal is to connect members in this niche of our industry and provide relevant content and support. Members of this group are invited to network, brainstorm, and troubleshoot all things consulting, from managing your business to asking for advice regarding strange RFP questions and requirements.

### **Submit Your Information**

We are building a directory of consultants within the GMC community. Use **this form** to submit your information or email program chair Caryn Kent Dean at **caryn@onceuponanrfp. com** for guidelines, disclaimers, and more information.





### **Book Club**

The next Book Club read is *Reading People: How Seeing the World Through the Lens of Personality Changes Everything* by Anne Bogel. The book provides an overview of common personality frameworks and suggestions for how to use their new understanding of personality. During May, join the online discussion in our **APMP GMC Goodreads group** for weekly discussion threads. Mark your calendars for a live Book Club virtual chat on **Wednesday, May 19**! The book is available in paperback, e-book, and audio (read by the author).

### **Mentorship Program**

After doubling the amount of mentor/mentee pairings over the last year, our program is at capacity for 2021. We'll launch the 2022 program later this year, so keep your eyes peeled for updates on how to sign up.



### Program Spotlight: APMP Certification Study Group

GMC has study groups to help chapter members prepare for their Foundation and Practitioner level certifications. When you participate in a

study group, you receive guided study sessions and the cost of your examination fee is fully covered. Sessions take place throughout summer and fall months. 2021 groups are already full. If you're interested in being put on a list for 2022 groups, please email the APMP Certification Study Group co-chairs at kaitlin.kousaie@essvote.com and lindsay.lange@ essvote.com.



### ABOUT APMP GMC

Founded in 2003, GMC serves the Greater Midwest region, which is comprised of the following states: Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, and Wisconsin. Although

we officially serve these 12 states, we have members all over the map. Any APMP member can join our chapter and/or meetings.

Our mission is to provide value to our members through engaging content, professional development, and networking. We strive to engage our members with valuable education, tools, and resources that not only advance your professional knowledge and experience in the proposal industry but also increase your engagement with APMP and our membership overall.

### **745 MEMBERS** across 12 states

### 3.04% MEMBERSHIP GROWTH for Q1 2021

### NEW APMP CERTIFICATION

Congratulations to the five individuals who have achieved APMP certification so far in 2021! Check future newsletters for a deeper dive on latest certification achievers as we celebrate their personal advancement and career growth.

# **8 PROGRAMS**

chapter committee members support eight programs, including mentorship opportunities and career development initiatives.



### 2021 APMP GMC BOARD

Andrea Dunger, CF APMP Katherine Becchina, CF APMP Alan Minnick, CF APMP Megan Kean Jen Roemer Hayley Watkins, CP APMP, CCMP Nichole Reber, CF APMP Sonali Oberg, CF APMP Heidi Romero, CP APMP Silke Cole, CF APMP Liz Megli, CF APMP Kati Stutsman, CF APMP, Shipley BDC Alexa Ramsey, CP APMP Courtney Lamensky Bette Sturnio, CP APMP Karen Hansel, CP APMP Heather Finch, CF APMP Dena Stukenberg, CP APMP Madeleine Redman, CF APMP Lindsay Lange, CP APMP Kaitlin Kousaie, CP APMP Karin Olson Held, CP APMP Caryn Kent Dean, CP APMP, MLIS Bruce Farrell Stacey Duwe, CP APMP

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Looking to become APMP certified? Learn more about the requirements by visiting the

**APMP Certification Program** page

online.



### QUESTIONS?

Contact us at admin@apmpgmc.org

Webmaster Co-Chair