



# Are We Stuck in the Past? The Need for New Thinking

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# Differing Levels of Maturity Across Bidders



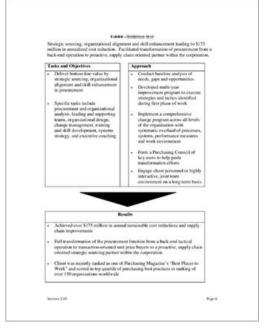


#### Bidder A



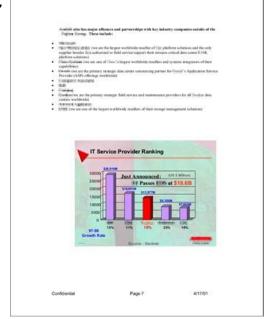
Rank 1/16 Score 94.80

#### Bidder B



Rank **4/16** Score **78.60** 

#### Bidder C



Rank 13/16 Score 49.25

#### The 1970s



Figure 1-1-1 summarizes the trade alternatives and the selected approaches (the heavy line traces our decision paths to the baseline design).

Optical Assembly Subsystem Trade. We first studied different approaches to famenating a schileren system, including the JPL approach (Phase B study baseline) and a proprietary modification of it called planar-Z. The JPL approach was discarded because of the need to maintain stability of optical elements located on a three-dimensional optical bench. The toeppler system requires long path lengths; the other two systems do not readily allow the shedwayraph function to be included.

We examined three methods of implementing the interferometry requirement: classical white light planar-Z schlieren, otherent light holographic, and a hybrid white light/holographic (to include capability for absorption measurements). The classical system contains all the optics necessary to accomplish the RFP requirements for schlieren, interferometry, shadowgraph, optical absorption, and transverse microscopy.

NOTE: The text went on to explain the entire tree. The explanation took 4 pages, so if your proposal is severely page-limited, you might want to use another technique shown in this booklet.

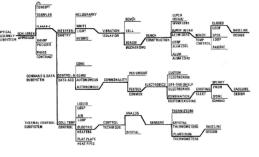


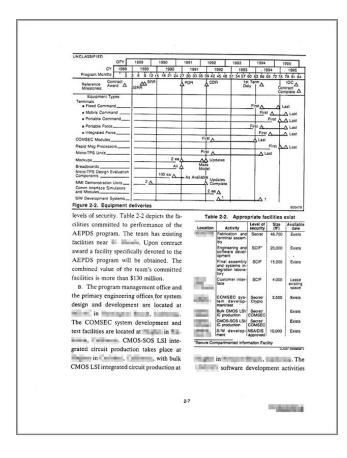
Figure 1, 1-1. FES Major Trade Decision Tree

16URE 5

- Technical report format
- "River-raft" technique common: graphic rafts on a river of text
- No widespread use of thesis statements
- However, STOP in use at Hughes
- Single column
- Simple layout
- Not easy to revise
- Hand-drawn illustrations
- Simple covers
- Typewriters
- Carbon paper and mimeographs
- X-Acto knives and Magic Tape

#### The 1980s

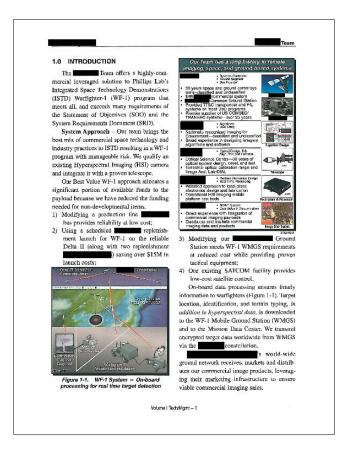




- Some double column formats
- Foldouts
- Word processor-based revisions, e.g. WordStar, WordPerfect, Word
- Tables made with IBM character set special characters
- Laser printers with monospaced fonts
- Simple vector graphic programs, e.g. GEM Draw Plus
- Desktop publishing using mainframes and workstations, e.g. LaTeX, Interleaf
- Color covers using photographic montages

#### The 1990s

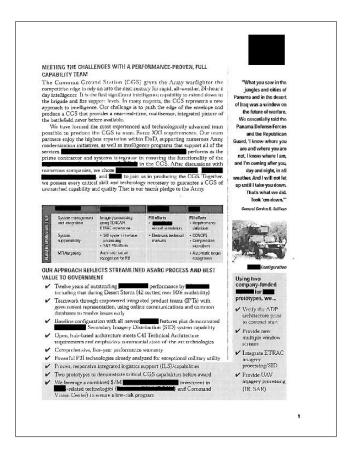




- · Color!
- Cover tells the story
- Text "illustrates the graphics"
- Emphasis on graphical elements for ease of understanding
- Consistent use of themes
- Focus boxes for the hard sell
- Templates custom to the proposal
- Mandatory use of foldouts to tell the entire story
- Strategically-planned proposal widespread

# The 1990s (with a bit of innovation)

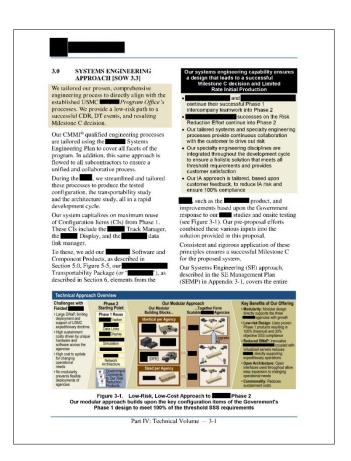




- Innovative template design
- Use of pull quotes

#### The 2000s





- Consistent application of themes
- Improved crosswise integration of win themes through graphics, text and cost
- Big improvement in cost volumes
- Big improvement in IMP/IMS
- Visually, not much changed from the 1990s
- Use of the same tools (Word, PowerPoint, Illustrator) just on faster PCs with different aesthetics

# When Did We Start Doing it This Way?



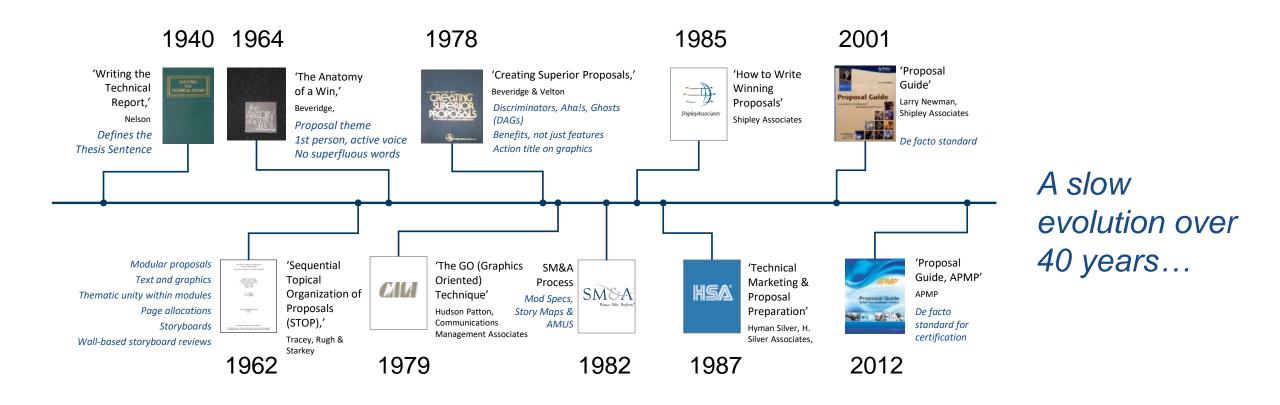
Ideas we accept as Best Practice have early origins:

Thesis sentences	'Writing the Technical Report,' Nelson, 1940
Modular proposals	"Sequential Topical Organization "Sequential Topical Organization"
Text and graphics	of Proposals (STOP),' Tracey,
Thematic unity within modules	Rugh & Starkey, 1962
Page allocations	
Storyboards	
Wall-based storyboard reviews	
Proposal theme	
1st person, active voice	'The Anatomy of a Win,' Beveridge, 1964
No superfluous words	AND
Discriminators, Aha's, Ghosts	
Benefits, not just features	'Creating Superior Proposals,'
Action titles on graphics	Beveridge & Velton, 1978

# Current "Best Practice" Has Early Origins

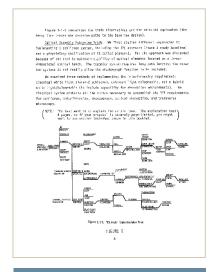


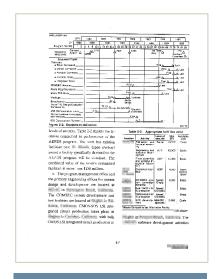
...and have since become codified into command media



# Through the Decades, Side by Side







1.0 INTRODUCTION

1.10 INTRODUCTION

1.10 INTRODUCTION

1.11 INTRODUCTION

1.11 INTRODUCTION

1.12 INTRODUCTION

1.12 INTRODUCTION

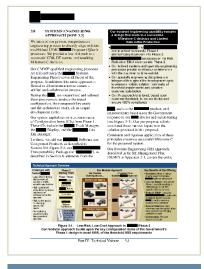
1.12 INTRODUCTION

1.12 INTRODUCTION

1.13 INTRODUCTION

1.14 INTRODUCTION

1.15 INTRODUCT



1970s

1980s

1990s

2000s

**Best practices** 



1995: DoD starts accepting 'paperless' proposals

Rise of the Information Age

1989: APMP founded

2004 APMP Certification begins

1993 Birth of the World Wide Web
First graphical web browser

# 5894 4F

'Proposal Guide' Larry Newman, Shipley Associates

De facto standard

### Persuasion on the Cheap



Conventional wisdom now widely adopted in our profession as a best practice is that "a picture is worth a thousand words", yet there is a visual persuasion gap

# What We are Taught in School (K-to PostDoc)



Since the advent of Gutenberg's printing press, our culture of learning is about reading and writing

We are discouraged to learn how to read pictures (comics) in school

#### Where the World is Heading



Five exabytes (one billion gigabytes) of content were created between the birth of the world and 2003. In 2013, 5 exabytes of content were created each day<sup>2</sup>, the vast majority of this as a visual representation of information

#### What We Need is Visual Literacy



We are flooded by information in images, from photographs to illustrations to flow charts to tables and information graphics, yet we were never taught how to read a picture in school

Is this skill so innate in our genetic makeup that it does not need to be taught?

#### What is this?

Company Delta



Medium-Low

Trade Study							
Product Feature			Defining Trait				
Α			Temperature				
В			Dimensions				
С			Modulus				
Company	Defining Characteristic	Product Maturity		Confidence	Cost		
Company Alpha	Light	8		High	Low		
Company Beta	Dark	12		High	High		
Company Gamma	Medium		11	Moderate	Medium		

Moral of the story: Selfish disrespect of property rights can put you in peril

Low

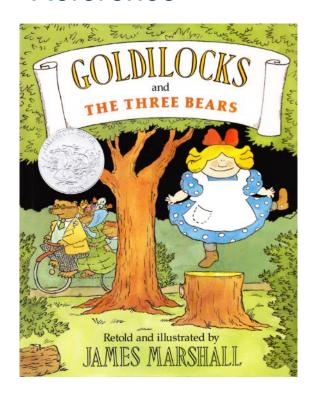
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Exotic





#### Reference



#### Memorable

nce upon a time, there was a little girl named Goldilocks. She went for a walk in the forest. Pretty soon, she came upon a house. She knocked and, when no one answered, she walked right in. At the table in the kitchen, there were three bowls of porridge. Goldilocks was hungry. She tasted the porridge from the first bowl.

"This porridge is too hot!" she exclaimed...

#### Not Memorable

Trade Study						
Product	Feature		Defining Trait			
Porridge			Т°			
Chair			Size			
Bed			Firmness			
Character	Traits	Age	Hunger	Size		
Goldilocks	Blonde	8	High	Petite		
Papa	Brown	12	High	Big		
Mama	Tawny	11	Moderate	Medium		
Baby	Red- Brown	3	Low	Small		

#### What is this?



Context: Challenge to address diminishing supplies of scarce resources

#### **Supply Strategies**

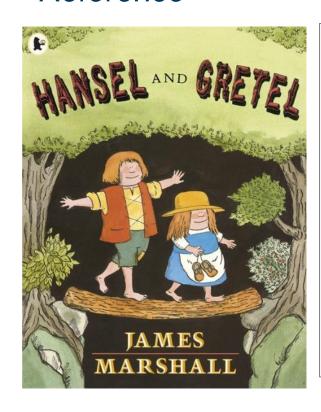
Competitor	Strategy	Teaming Approach	Critical Competency	
Company Alpha	Monopolize supply	Go Alone	Profitability	
Company Beta	Find adjacent sources	Team with similar size to take on larger competitors	Reliability	
Company Gamma	Eliminate competitors	Team with similar size to take on larger competitors	Innovation	
Company Delta	Find new sources	Opportunistic M&A	Past Performance	

Morals of the story: be cautious around strangers, don't judge solely on appearance, and beware of evil influences that lead you to abandon your values





#### Reference



#### Memorable

poor woodcutter with his wife and two children. The little boy called Hansel, and the girl named Gretel. There was never much to eat in their home...

"At the crack of dawn, let's take the children down into the deepest part of the forest. We'll make a fire for them out there and give them each a crust of bread...they'll never find their way back home, and we'll be rid of them..."

#### Not Memorable

Supply Strategies					
Strategy	Character	Critical Competency			
Monopolize supply	Stepmother	Greed			
Find adjacent sources	Hansel	Faith			
Eliminate competitors	Gretel	Cleverness			
Find new sources	Witch	Duplicity			

#### What is this?



#### **Evaluation of Competing Approaches**

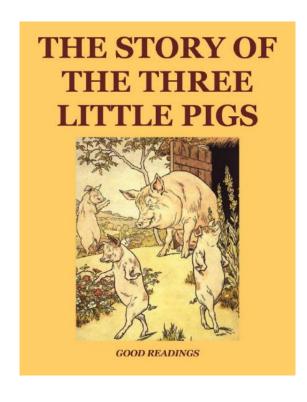
Main Choice	Company Traits		Outcome
Bid at threshold KPPs	Company Alpha	Poor past performance	Lose
Bid above objective KPPs	Company Beta	Overpromising	Lose
IRAD investment to create low-risk bid above objective KPPs	Us	Practical & clever	Win
Bid below threshold KPPs	New Entrant	Overconfident	Embarrassed

Moral of the story: hard work and dedication pay off; take the time and expense necessary to do things the right way. You may get by for awhile with shortcuts and shoddy work, but in the long run it will cost you.





#### Reference



#### Memorable

... Presently came along a wolf, and knocked at the door, and said, "Little pig, little pig, let me come in."

To which the pig answered, "No, no, by the hair on my chiny chin."

The wolf then answered to that, "Then I'll huff, and I'll puff, and I'll blow your house in." So he huffed, and he puffed, and he blew his house in and ate up the little pig.

The second little pig met a man with a bundle of furze, and said, "Please...

#### Not Memorable

#### **Evaluation of Competing Approaches**

Main Choice	Name	Key Traits	Outcome
Mud (straw)	Browny	Wallowing, but disobedient	Rescued from imprisonment
Cabbage (Sticks)	Whitey	Greedy & insatiable	Rescued from imprisonment
Brick	Blacky	Practical & clever	Savior
Deceit, Huff and Puff	Wolf	Deceptive beyond own good	Scalded to death



#### **Narratives are Second Only to First-Hand Experience**

Direct experience produces "experiential knowledge"

Analysis produces "evidentiary knowledge"

Narratives bring both alive for readers not at the creation

Captures complexity while communicating insights clearly

Moves others to understanding and motivates behavior

Provides the arc from mystery to discomfort to curiosity to credibility to empathy to solace to inspiration

Raison d'être for graphics to convey facts, data and evidence, processes and frameworks and abstract concepts

REASONED, COMPELLING AND MEMORABLE

#### We have a very hard job to perform



Our Audience	What We Want of the Audience	What Gets in Our Way
Mental capacity for processing information for most of us is 7, plus	Greater Knowledge transfer	Overly specified structure and other constraints imposed by the customer
or minus 2 (2.5 bits)	Higher level of understanding	
Most evaluators have a day job with more things to do than time	Relief from boredom	Complexity of subject and numerous subtleties
All proposals are greeted with	Longer retention	Unclear burden of proof in sufficiency of data
skepticism, cynicism, lassitude, or derision (pick one)	Fewer interpretative errors	Conventional wisdom and over-reliance on best practices

#### Role Reversal



Time to re-examine the role of text in proposals, and incorporate new methods

of the "art of narrative"

For the past 20 years we've incorporated state of the art thinking and tools in the creative act of graphics in our proposal tradecraft, but have not paid much attention to new methods for narratives now in common use for other purposes

Lacking visual literacy as an innate skill, surplus of data in graphics and proliferation of meaning creates a burden on the reader to reason for him/herself.

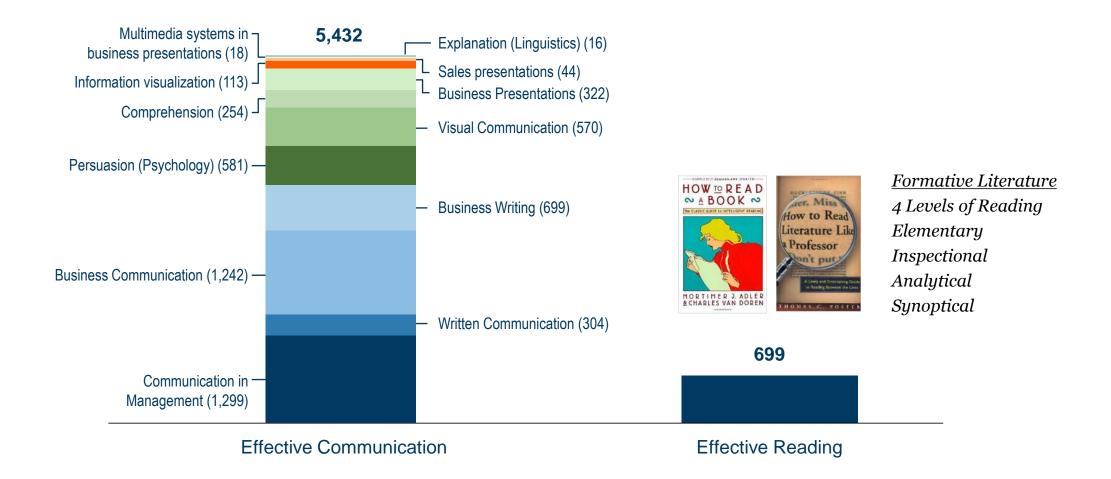
Tracey and others in 1965 set out to solve this same problem with STOP to shift the burden of logical coherence back to the author.

Have We Come Full Circle?



# Books by Subject (Library of Congress)





# Five Models of Non-Fiction Storytelling



Think of these as models for: Communication, Persuasion,

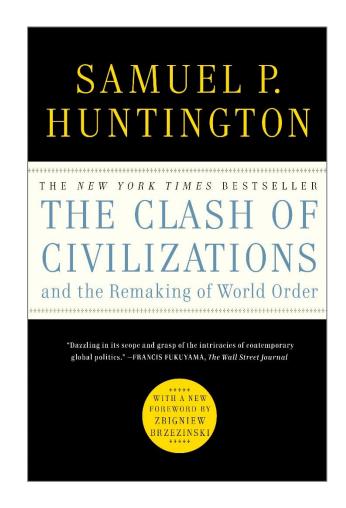
Engagement and of course... information sharing (but in many

cases, that's not really the most important function)

# Iconic Social Science Argument Trajectory



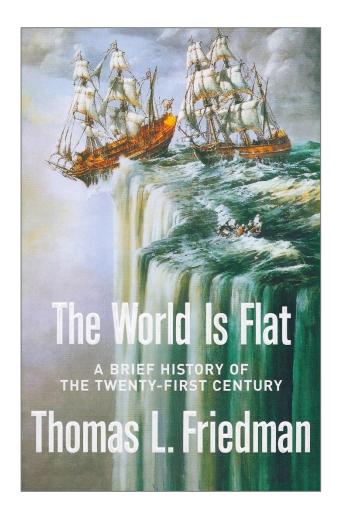
- What's the question/problem?
- Where does the question come from?
- What's the (hypothesized) answer?
- How did we arrive at that 'answer'?
- So what? If our answer is correct, what else of interest happens?



#### **Medical Rounds**



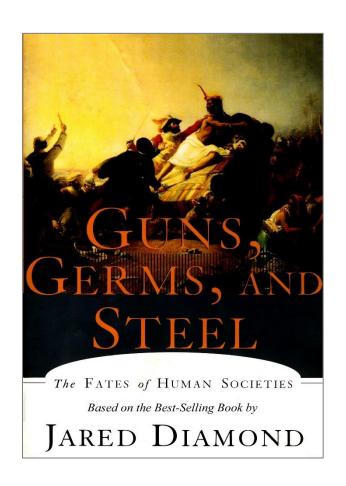
- Presenting Snapshot, then SOAP
- Subjective
- Objective
- Assessment
- Plan



# Iconic Inductive Reasoning Path



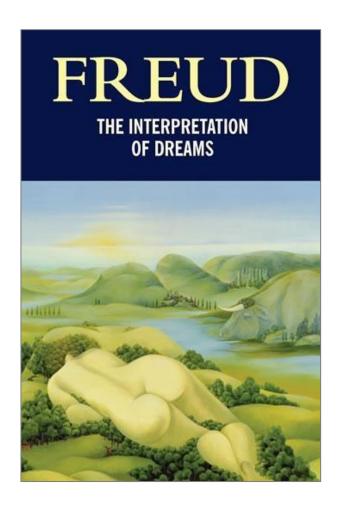
- From Data Points, to Generalizations
- No 'theory' per se, at least not as guiding principle for the story
- The story emerges from the details
- *The more data, the better*



# Iconic Deductive Reasoning Path



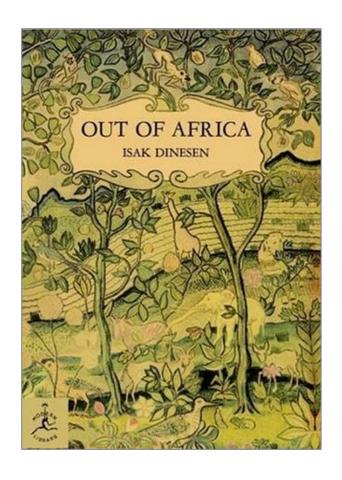
- From Theory to Hypotheses
- A big 'story' generates expectations about what you will see in the world
- The details follow from the theory
- The more generative and precise the theory, the better



# Ethnography



- 'Deep' narrative
- 'Embedded' storytelling the storyteller puts herself in the position of the subject
- Capturing 'Culture' is more important than explicating causality



# Some Basic Comparisons





Model	Optimized For	Weakness	Exec Sum	Technical	Mgmt & PP	Cost
Social Science Argument	big claims	Overly reliant on systemic arguments	✓			
Medical Rounds	specific cases	hard to learn from comparative cases		<b>√</b>	<b>√</b>	<b>√</b>
Induction	data mining	garbage in, garbage out, plus over fitting of data		✓		✓
Deduction	prediction	taking weak theories far too seriously		<b>√</b>		<b>√</b>
Ethnography	gestalt	unfalsifiable mush			✓	

# Communication & Persuasion Has Changed





#### Memorable and Compelling



# What's Next for our Industry?



Typical proposal for the last 10+ years

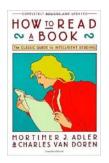


Tomorrow's proposal

#### Interesting Books



#### (Not a comprehensive catalog of worthwhile reading)

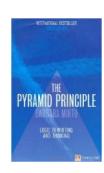


Adler, Mortimer J. and Charles Van Doren. How to Read a Book: The Classic Guide to Intelligent Reading.

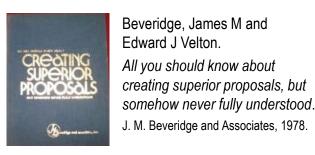
Touchstone, 1972.



McCloud.Scott. Understanding Comics: The Invisible Art. William Morrow Paperbacks, 1994.



Minto, Barbara. The Pyramid Principle: Logic in Writing and Thinking, 3rd Ed. Prentice Hall. 2010.



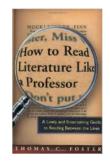
Edward J Velton. All you should know about creating superior proposals, but

J. M. Beveridge and Associates, 1978.



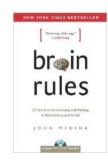
Newman, Larry PFF APMP. Shipley Proposal Guide, 4th Ed.

Shipley Associates, 2011.



Foster, Thomas C. How to Read Literature Like a Professor: A Lively and Entertaining Guide to Reading Between the Lines.

Harper Perennial, 2003.



Medina, John.

Brain Rules: 12 Principles for Surviving and Thriving at Work, Home, and School.

Pear Press, 2009.



Heath, Chip and Dan Heath.

Made to Stick: Why Some Ideas Survive and Others Die.

Random House, 2007.

### Interesting Articles



#### (Not a comprehensive catalog of worthwhile reading)

- Angier, Natalie. "A new mind meld: Merger of science with humanities." International Herald Tribune, May 29, 2008.
- Fryer, Bronwyn. "Storytelling That Moves People: A Conversation with Screenwriting Coach Robert McKee." Harvard Business Review, June 2003.
- Gurri, Martin, Craig Denny, and Aaron Harms. "Our Visual Persuasion Gap." Parameters. Spring 2010 (2010): 101-109
- Miller, George A. "The Magical Number Seven, Plus or Minus Two: Some Limits on Our Capacity for Processing Information." The Psychological Review. Vol. 63 (1956): 81-97
- Randall, Doug and Aaron Harms. "Using Stories for Advantage." Strategy and Leadership. Vol. 40-1 (2012): 21-26
- Tracey, J.R., D.E. Rugh and W.S. Starkey. "Sequential Thematic Organization Of Publications (STOP): How to Achieve Coherence in Proposals and Reports." Journal of Computer Documentation. Vol. 23-3 (1965): 4-68

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