

# Proposal Process Restructuring

**Table 1: Revision Control Table**

<b>Author</b>	<b>Version</b>	<b>Comments</b>
<b>Nick landolo</b>	1.0	first draft of entire document
<b>Nick landolo</b>	1.5	removed Netdocuments, added policies and roles, added graphic (pg. 19)

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## **Introduction**

The proposal development process currently being implemented at Viisage involves many areas of inefficient and redundant effort utilizing limited tools and resources. This process is in need of restructuring in order to streamline the development process and produce more reliable aesthetically-pleasing and highly marketable proposals for upcoming and future bids for contracts.

The purpose of this document is to discuss the various options that can be taken advantage of in order to develop a more robust and efficient proposal development process at Viisage. We will look at three key areas where improvements can be made: content creation, repurposing, and graphics; document management; and collaborative workflow. Add to these is a discussion of the various tools and resources that are commercially available to help us with this restructuring project (and their associated costs). And finally there is a word about aesthetics and proposed layout options.

Let us begin:

## **Content Creation, Repurposing, and Graphics**

### ***Content Creation***

After working with the established proposal development process for some time, it has become apparently clear that there are various stages in which content is created and delivered for integration into the overall proposal for any given project. These stages include, but are not limited to: original technical content written by engineers, software developers, or technical writers; executive summaries and overviews written by management personnel; graphical content created by consultants or the aforementioned; and ancillary content such as resumes, appendices, and editorial revisions performed by proposal managers (among others).

Each of these individuals (collectively referred to as, authors) are charged with developing and maintaining their own little sub-section of the larger document. Over time many errata can creep into the development process that ultimately takes lots of time and effort to correct. Such as:

- Formatting discrepancies that create inconsistent visual layouts throughout the entire document.
- Inherited document styles that bog down the process of re-formatting already inconsistent formatted sub-documents.
- Inconsistent writing styles, tone, and language, that detract from the overall flow of the entire document requiring much editorial work to correct.
- Unworkable graphics that are pieced together from a host of various elements that cause much hassle in order to update, re-format, and seamlessly integrate into the final document.

- Outdated content that when repurposed, needs updating yet suffers from the aforementioned issues

As you can see, the “old way” of doing things contains a lot of problems inherent into its basic makeup.

So how do we get the appropriate people to change their working styles in order to facilitate the overall proposal creation process?

The answer is establish standards by which everyone has to conform to.

At first glance, this may seem like an uphill battle that will cause a lot of resistance to these authors who are “set in their ways.” However, this is a fallacy as what will be proposed shall be a better, easier, and more efficient way of authoring original content.

### **Method One: Templates**

The problem with allowing authors to use the basic functions of Microsoft® Word is that most people are not fully trained on how to take advantage of its advanced features. Granted, if everyone knew how to use *Word's* styles and formatting capabilities, the entire proposal process would go a lot smoother. Sadly, that is not the case. In this paragraph alone, style and formatting have been used to illustrate this concept. The style used in the basic layout is called, “Body Text First Indent.” This style uses the Times New Roman font, at a 12 point size, and an indentation of the first line by 0.15 inches. Also, the word Microsoft® has a superscripted registered trademark symbol preceding it, as well as the second mention of the program *Word* is italicized as per Microsoft®’s strict trademark and logo use guidelines.

Who is going to remember all of this stuff? Probably very few people such as the proposal managers—who would have their hands full with a lot of redundant copyediting, proofreading, and re-formatting these documents.

A better way to handle this process is with the use of templates. Templates are a great feature of Microsoft® Word that can be quickly developed and loaded onto each author’s local copy of the application ready for use. *Word* templates can be so configured that it will only allow certain activities to be performed thereby making the final output much more standardized and readily able to integrate into the final proposal document.

Master documents with sub-documents can be created that will allow the individual parts to be reworked and reinserted into the whole making it a lot easier to index the entire proposal and generate a true Table of Authorities (Table of Contents, Table of Figures, etc.). Furthermore, these master/sub-documents can be password protected, versioned, changes tracked, and locked down from further changes once a final revision has been approved.

Without the need to “re-invent the wheel,” or have authors learn a new application in order to write original or new content for future proposals, the value of this option becomes clear. Yet, the next level to this entire proposal development process would and should involve a comprehensive document management system to be discussed later. For now on the lowest level, templates for Microsoft® Word can help authors get up and running quickly with little impact to their working style.

Which leads to the next method, styles.

## **Method Two: Styles**

If you have noticed while reading this document, several standard styles are being used throughout. Styles are basically conventions of how words are to be formatted on a page that represent topics, sub-topics, and host of other material. The basic Microsoft® Word styles for headings, subheadings, body text, and bullet points are very useful when indexing and outlining a document.

Granted, there is a lot that can be said about styles that go beyond the scope of this discussion; however suffice it to say, that agreed upon styles (set into the aforementioned templates) will greatly enhance the seamless integration and overall look and feel of any future Viisage proposal.

Of course, this is a precarious concept due to the fact that some prospective clients in their RFPs can outline the use of preferred styles in the final proposal presented to them. However, those are more the exception than the rule, and overall it would behoove Viisage's proposal development team to take the time and create comprehensive "style guidelines" that will make the authoring of content that much easier. Several possible agreed upon styles can include (but are not limited to):

- Headers and Footers
- Page Layout
- Fonts
- Headings and Subheadings
- Titles and Subtitles
- Main Text or Body Text
- Compliance Statements
- Table and Figure Captions
- Block Quotes
- Bullet Points
- Sidebars
- Placement of Graphics
- Use of the Viisage and L1 logos, and other Branding Material

A comprehensive style guide can be quickly and easily developed based on what has been ubiquitously utilized on past proposals along with good ideas for the future. The proposal and capture managers, with input from the marketing managers, along with final approvals from the executive team, can have a "blessed" style guide ready for integration into the aforementioned templates in a relatively short amount of time.

Use of a style guide is not unlike the next subtopic dealing with taking advantage of the benefits of using "boiler plates."

## Method Three: Boiler Plates

Boiler plates are “prefabricated text” (used widely in the Legal profession) to cut down on the need to rewrite the same content over and over again. This is different from the discussion in the next section of Repurposing content, but does have some similarities.

Using boiler plate information built into the templates can greatly assist the author in quickly getting their content developed and to the proposal managers on or ahead of time. Boiler plate information such as compliance statements, expository notes on proprietary hardware and software solutions, and any legalese, can be agreed upon per dedicated sections (that are common to most proposals in general) and integrated into the templates (complete with the proper styling).

Rather than “cut and paste” content from previous documents (which leads to the inheriting of inconsistent styles, formatting, and tone/verbiage), boiler plate information already in place will make it much easier for authors to focus on the specific content that they are charged with writing.

Much more can be said on this topic; however, a better way of looking at it would be to consider the pros and cons of “repurposing” content from previous documents and proposals.

## ***Repurposing***

Repurposing content from previous documents and proposals may seem like a simple and easy way to meet the authorship deadlines; however, this method is fraught with problems that need to be addressed and compensated for. Let us look at the pros and cons of repurposing content:

- Pros
  - Easy method to get content into a new document
  - Most of the same or similar content was used in a previous document so why rewrite it
  - Time saver that helps meet deadlines
- Cons
  - Creates inherited styles and formatting that need to be corrected, and in some cases completely redone
  - Not all of the repurposed information is accurate to the specific proposal at large, copyediting would be required to fix this issue
  - Repurposed information may be months or, in some cases, years out of date and would require a rewrite anyway—and if overlooked, could negatively impact the entire proposal bid process
  - Repurposing content is can be construed as lazy, and the same copy being repeated many times will inevitably lose its impact on the reader
  - Mistakes made with repurposed content will require time and effort to correct often being sent back to the original author for more edits.

Given the fact that the cons outweigh the pros why would anyone want to use “repurposed” content? Because, as mentioned before, it is a time saver. So how do we make the repurposed content better? By marking up both the “unchangeable” and “changeable copy” and creating separate documents that hold only the content to be repurposed and nothing else.

This may seem confusing so consider this following example:

A discussion about the layers of materials used in a license has both unchangeable and changeable copy in it. For the most part, the majority of content is unchangeable except when there is a new method of producing these cards or new materials are used. This singular concept can be made into its own document that contains markups for all of the aforementioned copy. Markups can be done with methods as easy as highlighting the changeable vs. unchangeable content, using different font colors, using comments, or going to the next level with XML tags (though this would be for a whole new way of creating and managing proposals in the future to be briefly discussed later in this document).

All in all, when one author steps in to take the place of the previous, they will be able to use repurposed content and easily configure it to the current proposals’ specs and matter. The legacy issues of styles and other errata are minimized if not eliminated altogether. Granted, file naming and markup conventions would need to be agreed upon, but that will just make the final process easier and more efficient by design.

And finally, this concept applies to the use of graphics as well. As you will see in the following topic.

## **Graphics**

One of the major issues with the proposal development process is the use or “misuse” of graphics.

Graphics are a powerful tool when promoting the benefits of Viisage’s products and solutions over its competitors. Everything from card designs, to network topologies, to management processes, can be further enhanced with graphics. Graphics should be able to be resized, repurposed (though following the same conventions for copy as previously discussed), and be easily updateable.

Sadly, this is not the case.

In previous proposals, the graphics have been predominantly Microsoft® grouped graphic elements that invariably cause the proposal manager to fight with in terms of placement and updating for the new proposal. *Word’s* drawing tools, though fairly useful, have limitations and are not really intended for the high-end graphics development required by corporate enterprises. The better programs for that are Adobe Photoshop, Adobe Illustrator, Adobe InDesign, and Quark Express to name a few.

That is not to say that Viisage has to invest heavily into these applications or into the staffing and/or training of dedicated graphic designers (though that is something to consider in the future); however, the use of graphics must be taken more seriously than it has in the past. Where to begin with graphics then?

## Applications

Adobe Photoshop is a great program for editing and retouching “photo-realistic” images for use in print and the web. In Viisage’s proposals there are not many of such images. And for those that are, having at least one licensed copy of Photoshop with someone who can do the editing (even an outsourced consultant) should be the minimum available resource. Which may indeed be the case.

Adobe Illustrator is great for what is termed “vector graphics.” In other words, graphics that are not necessarily photo-realistic but more drawing-based. This is an especially useful program when creating print to press materials such as published works like collegiate textbooks, magazines, etc. This program is more commonly referred to as a “desktop publishing” (DTP) program which the name pretty much says it all. The same goes for Quark Express as well. These would be useful applications should Viisage’s proposals go to a more “formally published and bound” format much like annual reports and government proposals. That should be something to consider for the future as Viisage could take these proposals from a utilitarian look and feel to more of a work of business and intrinsic art (should RFP guidelines ever allow it).

So this leads us to Adobe InDesign. As you will see, the Adobe line of products will be prominently featured in the breath of this entire discuss as they are uniquely qualified tools and resources to help Viisage create efficient, reliable, timely, and winning proposals.

Adobe InDesign has much greater functionality and robustness for DTP capability than *Word* will ever have. Adobe InDesign is a full-featured layout and design application that will take content from the *Word* and PDFs (presumably created with Adobe Acrobat Professional) and easily allow the graphic lead (which can be basically anyone from proposal manager to a savvy author) to place that content in a fully formatted ready to print layout that conforms to all of the aforementioned guidelines, etc.

The full features and functionality of Adobe InDesign are beyond the scope of this document; however suffice it to say, that with Adobe InDesign being the main graphic image management application, the quality and use of graphics should increase greatly helping to take Viisage’s proposals to the next level.

Granted, programs like *Visio* should also be utilized for its great flowcharting capabilities as many of the proposal graphics represent. And also Adobe Illustrator should be considered if certain proprietary graphics need to be created to illustrate a new concept or business process for example.

The bottom-line is that professional graphics design and integration need to be taken out of the amateur hands of Microsoft® *Word* and put into the purview of professional image editing software such as the Adobe products.

This is only part of what else needs to be implemented as far as graphics are concerned. The next stage has to include graphics management.

## Graphics Management

First and foremost, any image placed in a *Word* or InDesign document should be flattened and in its final form (or a clearly stated place holder thereof). Flattening of an



image simply means that all of the layers that make up that image from icons, text boxes, pointer, borders, etc., are flattened into just one layer with no grouping. Why?

Multi-layered, multi-grouped images are terrible to resize, edit, and place on a document. All of the image editing should be done beforehand in another application so that the final image will be easy to work with and save time in the proposal development process.

Furthermore, an image library needs to be created on a network share. Images simply embedded in documents cause all kinds of problems such as:

- Overly large file sizes
- Incompatible/inconsistent image formats (JPEG, BMP, GIF, etc.)
- Incorrect and un-editable images
- Loss of images due to a file transfer issues

A real image library, managed by Adobe InDesign, would eliminate most, if not all, of these issues. Image standards, like the aforementioned style guide, must be agreed upon and adhered to so that integration of these images into proposal documents will be quick, efficient, robust, and easy.

There should be logical groupings of images by subject matter. Images should adhere to previously established file naming conventions. And images should have size and attribute requirements. What does that mean?

An image can take several forms. It can be a PSD or Photoshop file that can be re-edited should the need arise (and also versioned for history sake). It can be a JPEG (or other formats as need be) that is a compressed flatted version of a PSD file ready for integration into a document or uploading to the Web. It can have meta-tags or meta-information, that can tell the author where it came from, who created it, what it represents, and keywords for searching and indexing in a large library of images.

All in all, images properly managed can have a great and positive impact on the entire proposal development process and needs to be seriously considered.

Managing graphics is at least as important as managing the documents as a whole, which is what the next major section will cover.

## Document Management

More than any other consideration for restructuring the Viisage proposal development process, document management is by far and away the most important. How so?

First and foremost are versioning, backup and recovery, and security of highly confidential and mission critical documents that are part of the lifeblood of this organization.

Take for example the recent New Mexico proposal. One of the proposal managers spent many hours re-formatting entire sections (which as previously discussed could be avoided by implementing the aforementioned recommendations) only to have them lost by a network storage issue. This is actually common to most companies who do not implement some kind of document management system along with a reliable backup and recovery data storage environment.

Think of the hours that were lost, and the hours that were required to recreate work that should never have been lost in the first place. There's a better way, and that way is through document management.

Let us look at the various document management options available from the simplest to the more complicated.

### ***Option One: Simple—Use Existing Tools At The Very Least***

Any original document created with Microsoft® Word for the purpose of proposal development should at least have “versioning” turned on. This allows *Word* to save previous historical iterations of the documents content should changes be made. As documents get passed around from one author to another, original copy will get completely lost and there will be no way to audit the information or track how it has changed completely despite the “track changes” option with *Word*—which also at the very least should be turned on.

Next are the use of “properties” for *Word* documents. If you ever wondered why there are so many fields for information in the Properties menu option in a *Word* document, they are there to contain valuable information about who the original author of the document was, the subject matter, document statistics, revision history, and probably the most valuable feature: keywords. Searchable, indexed keywords can be an indispensable tool when creating and managing *Word* documents. How so?

In a large document library on a network share, being able to search for that one particular document (that is buried under many layers of sub-directories) that has boiler plate info on PVC card specs will be quite the time saver for everyone. And all it takes is a few keywords put into the Properties of a document such as: PVC, card, specs.

Other document properties such as: category, URL, departments, completion dates, etc. all have valuable uses in large collaborative workflow environments such as a proposal development process. Normally, this kind of meta-tagging would and should be handled by a dedicated document management system such as Adobe Document Center, NetDocuments, or EMC Documentum's ERoom. Each of these solutions will be discussed later. For now, the time it takes to fill out these important fields of information

by the author (which should be requirement), will save lots of time later when we are scrambling to get the final proposal put together and delivered on or before the deadline.

Going back to the concept of a document library on a network share should also be examined more closely. Currently, there is one network share known as, the M drive, that hosts many of the documents that made up previous proposals. Certainly, if one needed to refer back to this repository for previous information then it is of course a valuable resource. However, it is an inefficient resource and can stand some improvement. There are two approaches we could take with this M drive:

1. Restructure the existing drive to conform to new directory and file naming standards
2. Start a new network share from the get-go that conforms to directory and file naming standards

Choice 1 would be beneficial if the bulk of any future work depended highly on all of the legacy documents in that repository. However, the amount of work involved initially to get every pertinent document on that drive “up to snuff” will take a very large and concerted effort.

Choice 2 could include migrating older documents to over time to the new network share and rework them to conform to the new standards. But, that should not be the only reason to start fresh with Option 2. Having brand new templates, boiler plate documents, refurbished repurpose documents, graphics, and other ancillary material that are fully configured and conform to the new standards would be best way to get up and running quickly and efficiently.

The next issue then to be faced would be backup and recovery. An agreement or policy must be made with IT for regular timely backups of all data on that network share! There is no room for negotiation on this point. If there are no backups, then the invaluable data that is lost for whatever reason is solely responsibility of managers who allowed the IT division to fail on this point. **THERE IS NO EXCUSE TO BE REMISS ON HAVING A BACKUP AND RECOVERY POLICY AND THE RESOURCES TO IMPLEMENT IT!**

The directory structure of said network share should have established and agreed upon project and content folder names which are true for the subfolders as well. Restricted access to such folders should be enforced. And creation of new folders must be approved by properly authorized agent. The reason for this seemingly “draconian” approach to the file management element of this process is simply that everything should have a proper place where it can be indexed and located quickly and efficiently. Microsoft® goes to great lengths to tightly integrate its productivity software (*Word*, *Excel*, etc.) and its operating systems (*Windows XP Professional* and *Windows 2003 Server*). Viisage should be taking full advantage of these built-in resources that are already at its disposal.

Finally, having fully and properly configured *Word* documents complete with extensive properties data in a reliable *Windows 2003 Server* network share that has a solid backup and recovery system, will allow for faster and better document management on the most basic of levels.

## **Option Two: More Involved—Document Management Applications**

Document management can be a very involved process. The simple approach, like the one described above, affords some reliability yet is limited in its functionality and long-term usefulness. The option of using document management applications provides a much more robust and versatile solution that has long-term value. There are two specific models that can be ascribed to this process: client-side applications, and server-side Internet/Intranet applications. Let us look at each one more closely.

### **Client-side Applications**

One of these client-side applications have already been discussed in great detail, Microsoft® Word's built-in features working in tandem with *Windows (XP Professional, 2003 Server)*. Through the use of these applications, an author working with *Word* will be able to perform all of the searching, revision control, and some degree of document management via the application itself. This is not a clean solution, but it is a simple one.

A better solution would be to use products like Adobe Acrobat Professional 8, the Adobe Document Center, and Adobe Connect—these last two being optional. Put succinctly, these applications are client-side programs (software that is predominantly installed on the author's computer), which also have an Internet-based component to them. The document management capabilities become truly apparent when these applications are put to use.

Features like document security, revision control, even “redaction” for shielding confidential material from public view, are all handled seamlessly via these products. Furthermore, there is a full-fledge collaborative working capability between these applications that allow more than one person to work concurrently on documents without running into versioning issues.

The full features and functions of using these products are far beyond the scope of this document; however, there are some very important benefits to consider:

- Integration with Microsoft® Word and Excel
- Better commenting, proofreading, and editing tools
- PDFs (the native format for Adobe Acrobat documents) are better suited for higher quality professional printing purposes
- Ease of combining files from different authors on the same subject matter
- Collaboration tools, especially live real-time web-based meetings via Adobe Connect
- The Adobe Document Center allows more security with documents even after they've been distributed, and tracks their usage

All-in-all, client-side applications are great for getting the raw materials put together and processed. However, other resources can be employed to take this process further to the next level.

## **Server-side Internet/Intranet Applications**

For brevity sake, this sub-section will deal with only one specific application, ERoom, that will illustrate the concept of Internet Applications being employed for document management tasks.

This application is an online collaborative workflow and document management environment that is meant to aid authors and management alike in development, revision, and project management tasks surrounding any business endeavor such as proposal writing. ERoom gets hosted on the organization's internal servers, and has a web-based component to it that can be accessible from outside the organization if need be. How does this relate to Viisage's proposal development process?

The first benefit is that authors are allowed to upload "blessed" documents to a web-based environment that will securely host and track them. Next, via a web browser interface, authors are allowed to check out and edit these documents using seamless integration with tools and applications such as Microsoft® Word. These "checked out" documents are now under a versioning control system that will inform other authors that the document in question is being worked on. When a document is checked back in, it is ready for any number of procedures such as: collaborative editing (more than one author at a time editing the document concurrently), review, promotion to a higher stage of the project management process such as "final version, ready for printing," etc.

The next benefit is being able to track document ownership, versions, and searchable meta-data. Should authors fail to include this information on the client-side writing level; these Internet applications will do most of that for them. The benefits of this process have already been discussed in the section, Option One: Simple—Use Existing Tools At The Very Least.

ERoom involves relatively low implementation costs. This application primarily works on a client/seat license flat rate. There are initial costs to set up these working environments, but after that the rest is pretty much ready to go with no further costs involved. ERoom's additional security benefit that it is contained all "in house."

Finally, should it become necessary for authors (or even clients) to have access to these materials remotely, these Internet/Intranet applications certainly allow for that by their very web-based nature.

There are many more benefits to this application that are far beyond the scope of this document, but essentially it comes down to having tools in place to help authors and managers maximize their content and minimize the labor-intensive tasks involved to develop such comprehensive proposals.

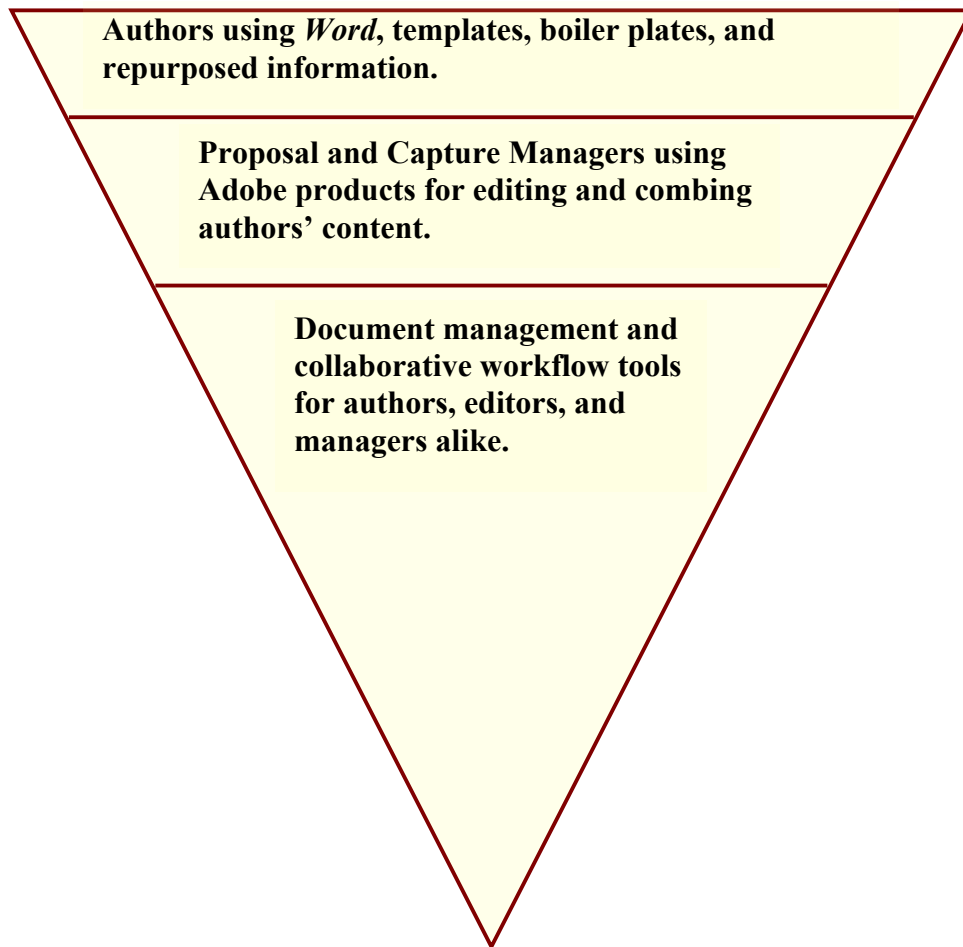
## Collaborative Workflow

All of the tools and processes mentioned so far really add up to one concept, collaborative workflow. At the end of the day, all of the work that goes into producing a winning proposal is the concerted effort of many individuals working together to create something that will benefit the entire organization.

Therefore, a few points about working collaboratively should be given.

The model the proposal development process that this document is trying to represent is much like an inverted pyramid, as the following figure represents:

**Figure 1: Collaborative Workflow Model**



This is all part of the collaborative workflow process. The major piece of this to consider however is that none of these tools will be effective if policies are not agreed upon and adhered to by everyone. Authors need to work within the guidelines of the restructured proposal process, and managers need to use the tools that are implemented in order to maintain solid workflow consistency and pave the way for future enhancements to the proposal development process. This all comes down to established policies and defined roles for all involved parties as discussed in the following sub-section.

## **Policies**

### **Authors**

1. All authors will use the new Microsoft® Word-based templates to create or edit their content for seamless integration into the larger proposal development environment. These templates will be installed on their local workstation copy of *Word* and will reside in a folder called, **Viisage Documents**. Content from previous documents, if not already reformatted, will be imported (without formatting) into the new template-based document and its new formatting will be applied. INSTRUCTIONS AND TRAINING WILL BE PROVIDED ON HOW TO EFFECTIVELY UTILIZE THESE TEMPLATES.

2. All authors are required to populate meta-data fields for the documents that they generate either by using boiler plate content, repurposed content, or writing original content. The meta-data can be either completing the **Properties** fields of data in Microsoft® Word documents, or tagging index and revision control information for documents in the document management environment (e.g. **EMC Documentum's ERoom**), or both as directed by management.

3. All content and documents for current proposal projects will be stored on a **dedicated network drive** or in the **document management environment**. THERE WILL BE NO EXCEPTIONS TO THIS POLICY. Future edits to said documents will be performed on the “uploaded” and managed versions of these documents. No local copies of documents will be accepted as official documents and content for proposal projects. Only new and original documents can be created locally on the author’s workstation using the templates mentioned on *Policy 1*, but then the “saved out” document will be uploaded for subsequent revision control, indexing (as defined in *Policy 2*), and managing.

4. All authors will work closely with graphic designers to develop properly designed and formatted graphics that will be rendered in a dedicated graphics design application such as **Adobe Photoshop/Illustrator, Visio, Quark eXpress**, or similar programs. NO GRAPHICS ARE TO BE IMPORTED BY THE AUTHORS INTO ANY DOCUMENTS UNLESS THEY ARE APPROVED BY PROPOSAL/CAPTURE MANAGERS AND ARE IN THE CORRECT FINAL FORMAT. Furthermore, all graphics are to be stored in the very same manner and a dedicated graphics management repository as described in *Policies 2 and 3*. Authors will not create graphics themselves.

5. Authors should work with the Proposal Managers (acting as editors) to help them refine their writing style to mesh more closely with the overall tone and style of the overall proposal. Certain language-style conventions should be adopted based on ubiquitous tomes such as The **Chicago Manual of Style** (15<sup>th</sup> Ed.) and the **Modern Language Association's (MLA) Style Manual and Guide to Scholarly Publishing** (2<sup>nd</sup> Ed.). This policy would be to help ensure that the quality of the proposal writing and the heterogeneous document conventions (recognized by national and international organizations) would be raised to their highest most professional standards.

6. Authors will be **held accountable** should they fail to meet their appointed content writing deadlines as more lead time for proposals are given to better meet deadlines for submission to prospective clients. THIS POLICY WILL BE STRICTLY ENFORCED.

## Proposal/Capture Managers

1. Completed documents from authors (which can include documents written by Proposal/Capture Managers) will be edited and managed within the document management environment such as **EMC Documentum's ERoom** (i.e. no local copies on a user's workstation; unless for example, "checked out" by user and then immediately "checked back in" to the ERoom). Furthermore, any singular and collaborative document editing efforts will be conducted in a professional document development environment such as **Adobe Acrobat Professional** – Microsoft® Word should only be used to either create new content or to replace inappropriate or corrupted content. The editing process will take place in a dedicated environment like Acrobat unless management or the prospective clients want to see documents marked up in *Word* with the "track changes" feature turned on.

2. Graphics design should be conducted by **dedicated and properly trained personnel**. Proposal/Capture Managers (unless fully trained in graphics design programs) should not be responsible for creating new graphics or editing existing graphics – THAT IS NOT THEIR PURVIEW. This policy is similar to *Policy 4 for Authors*.

3. Any other ancillary documents such as PDFs from third parties or other external matter included into the final proposal (as "exhibits" for example) but created elsewhere are subject to **all** relevant policies previously stated.

4. Timelines for document editing will be handed down from either the Capture Manager or a dedicated Project Manager. PROPOSAL MANAGERS WILL NOT ACT AS PROJECT MANAGERS. Proposal development tasks need to be properly parsed out with as little overlap as possible in order not to severely compromise the quality and effectiveness of the overall work.

5. Proposal Managers should not work in a vacuum; in other words, they should work collaboratively with Authors and Capture Managers and anyone else to help ensure that the proposal development project is on track and on focus. Regular meetings should be held to help this process along. Proposal Managers should also have the **authority** to call a meeting of all relevant parties should a serious problem (beyond the purview of the Proposal Manager) arise that warrants immediate attention.

6. Proposal Managers, after proper training, can suggest new layout and design options for current and future proposals utilizing robust and dedicated applications such as Adobe InDesign. ALL NEW LAYOUT AND DESIGN OPTIONS ARE SUBJECT TO RFP REQUIREMENTS AND EVALUATIONS/APPROVALS BY MANAGEMENT.

7. Proposal/Capture Managers will be charged with the responsibility of fulfillment (printing) and bindery tasks for final proposal output. This can include (and is highly recommended) working with an outsourced entity such as **Kinko's**, or recruiting temporary help (either in-house or via a temporary staffing agency) to complete this project phase – the latter must be handled by the Capture Manager as this falls under "resource allocation" and therefore is part of the "project manager" role.

8. Proposal/Capture Managers are also subject to *Policy 2 for Authors*.



## **Roles**

### **Authors**

Authors are primarily anyone who is directly involved in the creation of original material or the revamping of existing material used in the content generation phase of the proposal development process. This can include but is not limited to: engineers, software developers, marketing strategists, account managers, sales personnel, public relations personnel, financial analysts or consultants, lawyers or legal counsel, executive managers, capture managers, and proposal managers. The author's are at the top of the inverted pyramid of the proposal development process by which their raw content will filter down to a refining process to the next level of editorial staff. Authors are many in number, but as the process gets further along the next echelon of individuals gets smaller in order to keep the workflow going along smoothly and efficiently.

### **Proposal Managers**

Proposal Managers are part of the “editorial” phase of the proposal development process. **PROPOSAL MANAGERS ARE NOT PROJECT MANAGERS.** They are in fact editors and facilitators of the final output of the proposal submission materials. Proposal Managers work with a number of tools to help manage documents and graphics, assemble the various proposal components into a viable and working form, edit content when necessary, and propose layout and design options for current and future proposal projects. Proposal Managers are trained in the use of tools and resources to help this process along such as **Microsoft® Word, Adobe Acrobat Professional & InDesign, and EMC Documentum's ERoom.** Proposal Managers can also help train authors to use several of these tools or act as a “guru” for help when using these applications. Proposal Managers are also responsible for the fulfillment and bindery tasks involved in the final proposal development phase. Proposal Manager “do not” interface with clients, but they can deal with management when necessary.

### **Capture Managers**

Capture Managers are also part of the “editorial” phase of the proposal development process. They share a lot of the same responsibilities as the Proposal Manager and both serve to supplement each other's efforts at times. However, there are several clear distinctions between the two that bears note. Capture Managers “do” interface with both clients and management on a routine basis. Capture Managers are responsible for all project management tasks associated with any given proposal development project which can include but are not limited to: timelines, resource allocation, budgeting, reporting, account management, and conflict resolution. As far as the proposal development process is concerned, the Capture Manager and the Proposal Manager work closely to see that the standards and policies of the process are being judiciously adhered to, and to provide ancillary editorial support for proposal content.

## Management

Management, as far as the proposal development process is concerned, plays a role in signing off on final proposal output for submission to clients. Furthermore, management approves any new: procedures, policies, tools, layout and design, and budgets for any given project. Management can be involved in the content creation process when inclusion of their specialized information is required by the RFP. That being said, management must conform to the policies set forth for Author's listed in the previous sub-section. Management "does not" however, play a role similar to that of the Proposal/Capture Manager. Management does have the authority to overrule decision from staff in any of the previously defined roles when the situation warrants it.

## Clients

Clients are simply the organizations that put for the RFP for which Viisage attempts to produce viable and winning proposals. Clients have a lot of say in what they are looking for and hold the "purse-strings" when it comes to new or existing business. Clients must be handled delicately as their needs can unexpectedly change putting greater onus on Viisage and its staff to meet these new challenges.

## Vendors

Vendors are any third party entities that Viisage employs to help with specialized sectors of the proposal development process that it is neither equipped nor willing to deal with. Examples of this are: printing and binding, generation of graphics and media content (if applicable), transportation of final proposal submission materials, staffing agencies (providing temporary employees), and various consultants. Vendor costs are managed by the project managers and budgets for such are approved by management. In no way should vendors be involved in the proposal content development process (except for graphic design) unless consultants are needed to provide ancillary information that can not be generated in-house. Vendors are very useful with **labor-intensive tasks** such as printing and binding hundreds and hundreds of pages for a proposal – which is highly recommended.

### Proposal Development Environment

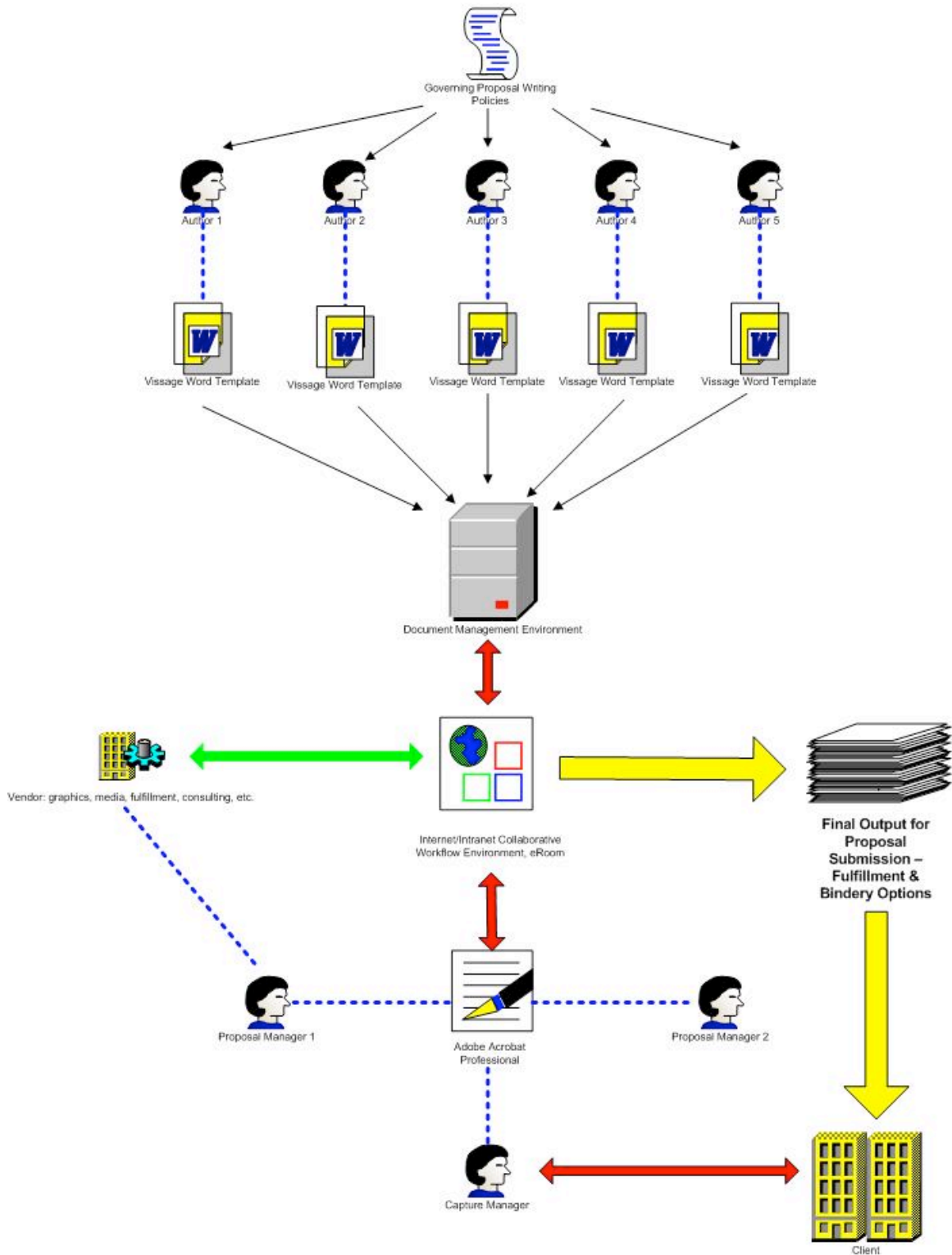


Figure 2: Proposal Development Environment

## Costs

Budgets for Microsoft® products have already been established; therefore, there is no need to price out any of these at this time. The remaining products previously discussed in this document have different kinds of associated costs involved. The following table will suggest potential costs based on generic criteria as a base-line for further cost evaluations.

**Table 2: Potential Costs**

<i>Product</i>	<i>Cost per license</i>	<i>Cost per subscription</i>	<i>Suggested units</i>	<i>Totals</i>
<b>Adobe Acrobat Professional 8</b>	\$449		5 licenses	\$2240
<b>Adobe InDesign CS2</b>	\$699		1 license	\$699
<b>Adobe Document Center</b>	\$199		5 licenses	\$995
<b>Adobe Acrobat Connect</b>		\$39 per/month (up to 15 users at once)		\$468 for 1 year
<b>EMC Documentums ERoom V7.3</b>	\$300 (1 user license)		5 licenses	\$1500
<b>ERoom Startup Costs</b>	Varies, approx. \$1200			\$1200+

All of the above costs are for demonstration purposes only; therefore, no grand total can be given at this time. Actual costs will be based on established needs and requirements to be determined at a later time. There may be hidden costs that can only be explained by the 3<sup>rd</sup> party vendor representatives.

In a nutshell, the overall costs for implementing a suite of new applications and tools for a restructured proposal development process probably wouldn't exceed \$10,000, and most likely not even half of that depending on what strategy the entire team decides to support.

If and when any of these products and solutions are adopted there should also be discussion on another very important component of the proposal development process: aesthetics and proposed layout options.

## Aesthetics and proposed layout options

In this final stage of the proposal development process, a several new ideas on layout design should be considered. Though the overall look and feel of the existing proposals are perfectly fine for what their intended, there is always room for improvements in aesthetics and actual editorial practices. Such changes could involved the following:

1. **Two Column Format** – this newspaper/newsletter format offers some advantages over a full-page format such as easier readability, shorter inherent paragraphs, and a fresh new look overall.
2. **Graphical Elements** – essentially creative elements added to the graphics such as borders and drop-shadows for a more professional and stylized look and feel.
3. **Block Quotes** – any learned opinions or vital selling points should be set apart from the main text in a bolded, centered, fully justified block quote format that signifies real emphasis on the subject.
4. **Subtle Compliance Statements** – is it not the purpose of the entire proposal to comply with the requirements of the prospective client? If so, there is no need to have a screaming insecure-looking compliance statement set apart from the rest of the text. Better to move that statement to the beginning paragraph of the accompanying text and italicize it for subtlety—thereby meeting the requirement to have a compliance statement, yet making it look more natural and flowing in the text.
5. **Smaller Paragraphs and Smaller Bullet Points** – this is relatively self-explanatory. No one wants to read a non-fiction paragraph that is half a page long of perfunctory text. Nor do they want to read bullet points that are also paragraphs in length—thereby defeating the purpose of the bullet point to begin with. Smaller is better. An easy fix simply by breaking up the content in smaller pieces.
6. **Reduce Redundancies** – if something has already been said, a simple reference to it will suffice. Too many redundancies may cause the reader to think that the authors are either lazy or dull—both of which could have a negative impact on the consideration of the proposal.
7. **Prettier Tables** – simple row and column tables do not have the same appeal as tables with colors, nice fonts, and illustrated icons (like check marks).

The following section should give a better illustration of these concepts. The numbers above correspond to the following examples given.

1

2.4 Does Viisage's DL/ID's comply with the Federally Mandated REAL ID Act?

4

*Viisage agrees to comply with all provisions of the federal REAL ID Act.* Viisage also understands that any additional costs resulting from new federal requirements, specified after the date of the contract, for new card stock and additional security features shall be the responsibility of the agency.

With that in mind, Viisage designs our card solutions as "platforms" that can be easily and inexpensively adapted to changing requirements and emerging security concerns. Following are some key aspects of our proposed card solution which will allow the MVD and Viisage to attain REAL ID compliance in a timely fashion and with minimal risk:

5

- designed to meet the latest AAMVA DL/ID card design specifications
- designed to provide the utmost in security and integrity
- can be changed to meet REAL ID requirements
- Flexible system design regardless of future requirements
- designed to support a flexible card manufacturing process and can be adapted if necessary

- The Viisage card production platform can be updated to meet REAL ID requirements
- The Viisage card production facility is designed and is secured to meet REAL ID requirements
- The Viisage inventory management system is designed to meet REAL ID requirements

Conscious of the impending provisions of the REAL ID Act, we will provide New Mexico with a card solution that offers a clear and timely upgrade path to REAL ID compliance, should any changes be necessary.

2

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2.5 Will the DLs and IDs meet or exceed the standards of the American Association of Motor Vehicle Administrator's (AAMVA) Personal Identification – AAMVA International Specifications – DL/ID Card Design?

3

Viisage's proposed solution, including DL/ID card samples submitted with the proposal, is in compliance with the AAMVA standards.

Our card designs will not only meet the specifications outlined in the RFP, but will also follow the recommendations contained in the latest *AAMVA document; Personal Identification - AAMVA International Specification - DL/ID Card Design*. Compliance with the AAMVA standards is the foundation of many aspects of our proposed solution (i.e. card

construction, security features, quality control, production, etc.) and is documented in detail throughout our proposal. We follow a strict practice of presenting all design concepts to the MVD for review and gaining your written approval before producing any document.

For the convenience of the MVD, we highlight below several key features of our compliance with AAMVA specifications. Compliance with the AAMVA standards includes, but is not

7

limited to, DL/ID card design, mandatory and optional data elements, zone contents and placement, horizontal/vertical layout, physical size, reproduction of portrait and signature image, physical security features, bar code, and testing methods. Please note that the provided card designs are to serve as examples only and that Viisage will work with MVD after contract award to finalize the card design, layout and contents of each card type.

Personal Identification – AAMVA International Specifications – DL/ID Card Design (2005-March)	Viisage's Solution Compliance
AAMVA DL/ID Card Design Specifications (Ver 2.0) (includes sections on Mandatory/Optional Data Elements and Quality Control Annex A (normative) Card Design)	✓
Annex B (normative) Physical Security	✓
Annex C (normative) DL/ID Security Device Index	✓
Annex D (normative) Mandatory PDF417 Bar Code	✓
Annex E (normative) Card Durability Test Methods	✓
Annex F (normative) Optional Magnetic Stripe	(N/A)
Annex G (normative) Optional Optical Memory	(N/A)

Table 3: Compliance with AAMVA Specifications

**Card Dimensions**

As illustrated in the following figure, the standard DL/ID card size dimensions will be 3-3/8" wide x 2-1/8" high with corners rounded with at a radius of 0.125". Thickness will be industry-standard credit card size of .030" (+ or -.003").

2

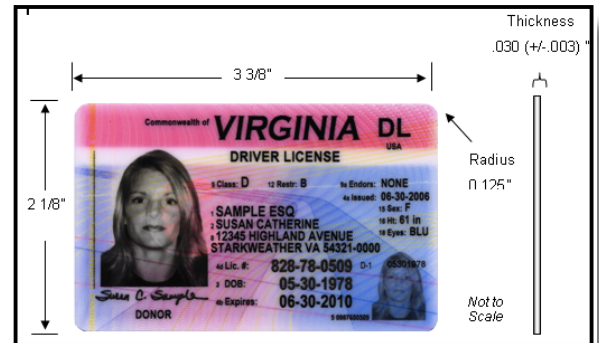


Figure 3: Card Dimensions

latest *AMMVA DL/ID Card Design Specifications* in both a horizontal and vertical format. We follow a strict practice of presenting all design concepts to the MVD for review and gaining your written approval before producing any document. The UID and DLA recommendations will be reviewed with the MVD as part of this project (see: *Schematic 1: AAMVA Content Placement Recommendations for Vertical and Horizontal Cards*).

6

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### 2.7 Do the DL/ID cards have a unique serialized number?

Each DL/ID card will contain an individual and unique serial number as well as a corresponding linear bar code on the card back. During card personalization each card's serial number will be tied to the specific cardholder for the duration of the card life. This will allow MVD to definitively verify whether a certain DL/ID card had been issued to the cardholder whose biographic data is printed on the card. In addition, the card serial number will be used by the Viisage Secure Inventory Management System (SIMS) to track card material throughout the card production process. Lastly, Viisage proposes the option of encoding the card serial number onto the 2D bar code to further thwart alteration or cannibalization attempts; a discrepancy in the card number between the linear and 2D bar

codes would indicate a fraudulent card.

### Card Stock Production

Each card will be pre-printed with a unique serial number and a corresponding linear bar code during manufacturing. Strict quality control procedures will be followed to ensure that no duplicate numbers are printed and that no cards are missing a serial number.

The following figure shows an example of the serialized card stock:

2



Figure 4: Serialized Card Stock



## Conclusion

With all of these ideas being presented, it may seem that restructuring the proposal development process might be more trouble than it is worth. However, when one considers that time it takes to rewrite, reformatting, and duplicate efforts that have already been made, that apparent value of some kind of robust alternative become clear.

Not all of these recommendations need to be adopted in order to help streamline the proposal development process. Certainly, the more exotic solutions can be implemented over a larger period of time. The first step on this journey should begin with a review of these ideas and feedback given for more concepts and methods of change.

All-in-all, there is certainly a next step to be taken with Viisage's proposals. You can guarantee that the competition is either considering such measures or have already implemented them. Why should this better suited organization be any less armed with the tools necessary to compete and supersede all challengers in this industry?

In a modicum of time we can take Viisage's winning proposals from professional documents to veritable works of art.