7. PROPOSAL PREPARATION & PUBLISHING

An effective Proposal Team accepts contribution responsibilities, meets all proposal deadlines, understands the proposal publishing process, and exhibits true teamwork.

SECTION PREVIEW

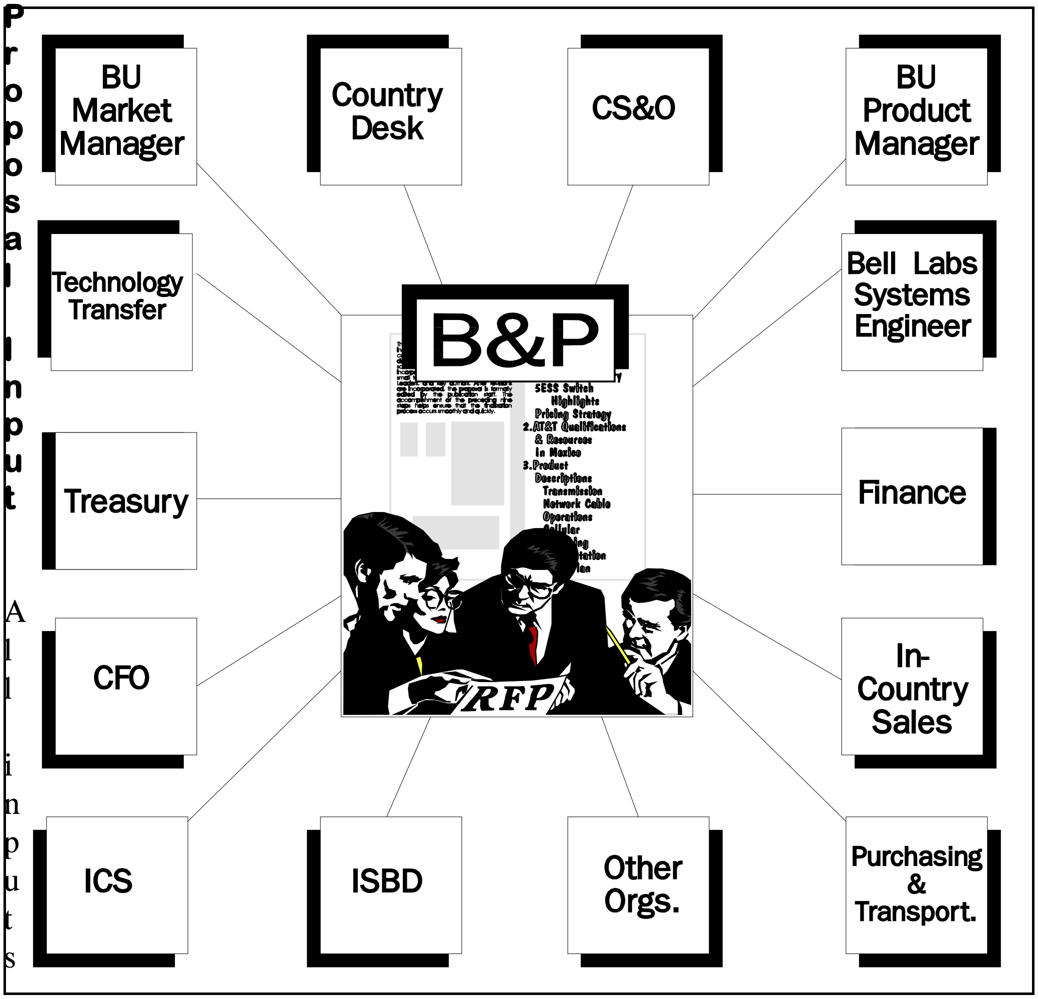
- Proposal Publishing
- Proposal Input
- Receiving and Editing Input
- Content/General Editing
- Copy Editing Input
- Proofreading Input
- Section Author Responsibilities
- Electronic Transfer of Input
- Creating Graphics
- Using Boilerplate (Generic) Text
- Writing Proposal Input
- Creating the Point-By-Point Outline
- Writing Point-By-Point Input
- Typical Point-By-Point Responses
- Author Reviews
- First Draft
- Additional Drafts
- Re-Writing the Draft Executive Summary
- Writing the Draft Cover/Submittal Letter
- Proposal Production-Effort Prioritization
- Cross-Team Resource Sharing
- B&P Production Support
- Word Processing
- Visual Communications
- Reproduction
- Translation

Proposal Publishing

The end products of the B&P organization are proposals. The proposals, or "books," developed by B&P with the Proposal Team, describe and sell the systems and services AT&T is offering to the customer, which are the solutions to the customer's business problems. Although these "books" provide customer-requested technical information, proposals are not solely technical documents. A proposal is a published technical sales tool. Successful proposal development requires the balanced blending of three distinct and broad skill sets:

□ Sales and Marketing Expertise
□ Technical and Engineering Expertise
□ Proposal Management and Publishing Expertise.

Professional proposal management and publishing expertise is required to develop quality proposals, and is central to the entire process (see Figure 7-1). All the organizations represented on a Proposal Team supply input into this function which melds information from these diverse sources into a coherent, readable, attractively packaged, and winning proposal.



B&P is the hub of the customer request response process.
Figure 7-1

Proposal Input

All inputs are received and tracked by the Proposal Manager, assisted by the Technical Writer. The Proposal Manager ensures that all commercial and technical point-by-point issues are being properly addressed, and that the information provided is complete, pertinent, and compliant to the customer request requirements. The Technical Writer, as time permits, makes sure that each section reads smoothly and matches the style of the overall proposal, thus creating a unified and coherent document. Copies of inputs are also made available to the Account Team which verifies that each section contains a proper sales/marketing slant targeted to the specific customer. Written input is provided in the format required by the Technical Writer, and submitted electronically whenever possible.

Receiving and Editing Input

One of the first responsibilities of the Technical Writer is to not accept unacceptable input. It is the responsibility of the Technical Writer to refuse to accept incomplete, illegible, inaccurate, handwritten, or otherwise unacceptable input.

When acceptable input is received, it goes through at least three major "editing" phases: Content/general editing, copy editing, and proofreading. The Technical Writer is solely responsible for doing content editing, and for supervising support personnel or Proposal Team members in the copy editing and proofreading phases.

Content/General Editing

Content editing, also referred to as substantive or general editing, involves rewriting, reorganizing, and suggesting other ways to present the material. This could also be referred to as "macro-editing", as it involves looking at each section as it relates to every other section. Content editing addresses such issues as:

☐ Does this section respond to the customer's needs as stated in the customer request?
☐ Does this section read well from paragraph to paragraph?
☐ Is this section organized logically?
☐ Does this section make sense?
☐ Does this section fit into the context of the entire proposal?
☐ Is this section placed logically within the proposal?
☐ Is the style of this section consistent with the rest of the proposal?

At this stage, if something does not make sense or does not flow, it is substantially edited, rewritten, and reorganized by the Technical Writer who may consult with the section author. While a section author determines the information content of input, and the Proposal Manager verifies that the content is compliant to the customer request, the Technical Writer is the final authority on matters of style, sense, and order.

Copy Editing Input

Copy editing is the prepartion of written inputs for typesetting and publication by correcting errors (spelling, grammar, punctuation, etc.), improving style, and so on. This is also referred to as line editing since the manuscript is copy edited line by line. It may also be thought of as "micro-editing." **The Chicago Manual of Style**, the editor's "bible," states, "Copy editing…is [a] most important and most time-consuming task. It requires close attention to every detail in a manuscript, a thorough knowledge of what to look for and of the style to be followed, and the ability to make quick, logical, and defensible decisions."

Whenever possible the Technical Writer avoids being *both* the editor and copy editor on the same proposal, utilizing skilled support staff, B&P Production Specialists (often Temporaries), or other Proposal Team members for the copy editing task. To achieve a professional quality proposal, a second set of eyes is crucial at this point. An excellent reference for copy editors is **Copyediting: A Practical Guide** by Karen Judd. Other basic references for the well-equipped copy editor include: **The Chicago Manual of Style**, **The Bell Labs Style Guide**, and **The American Heritage Dictionary of the English Language (unabridged)**.

Content editing and rewriting, followed by copy editing, are done *before* the input is given to Word Processing for typesetting. If the input is provided electronically, then all phases of editing may be done on-line.
Remember, however, to print and preserve at least one hard copy of all the originally submitted material.

An excellent software tool for the copy editor is Grammatik®. This software will highlight potential grammar problems, excessive use of the passive voice is used, as well as indicate reading levels of material. However, while grammar and readability software is useful, it cannot replace the special necessary talents of the skilled Technical Writer, copy editors, and proofreaders.

Proofreading Input

Proofreading literally means "to read and correct proofs." This is the third editing phase, and occurs after inputs have been typeset by Word Processing. It is performed by support staff, B&P Production Specialists (often Temporaries), or other Proposal Team members under the supervision of the Technical Writer, or by the Technical Writer.

A proofreader compares, word for word, the original, marked copy with the typeset "proof" copy to ensure that the typeset copy incorporates all of the text and editing changes included in the original. The proofreader's focus is not to make further editing changes or corrections, but to make the typeset copy read exactly like the original, edited copy. A proofreader may, of course, correct spelling, punctuation, and obvious errors overlooked in previous editing.

However, while the proofreader may "query" the Technical Writer concerning perceived content or style problems, the proofreader may not arbitrarily make substantive changes to the text.

If errors are found in the proofread copy, the proofreader resubmits it to Word Processing, and proofreads the second set of corrections. This cycle is repeated until the typeset copy incorporates all of the original editing and changes.

Section Author Responsibilities

All organizations responsible for providing input to the proposal are represented at the Proposal Team Kickoff Meeting. If possible, the section authors attend. If they are not able to do so, the attending representatives report on and discuss the project -- specific requirements, expectations, and proposal Timeline -- within his or her organization. Appropriate individuals are then assigned to fully support the effort and provide the actual written input. Each section author is responsible for the following:

☐ Adhering strictly to the proposal Timeline and themes

☐ Keeping the Proposal Manager fully informed of progress, problems, etc.

☐ Providing complete, accurate, and typed input the first time ("Once and Done!") in the format required by the Technical Writer

☐ Removing any barrier that threatens to impede completion of the assigned section(s), including escalating to higher management levels if necessary

☐ Coordinating individuals or groups as needed to supply additional information for the section(s)

☐ Delegating responsibility to an individual who can be called upon for timely and accurately written input and clarification in the event the principal author is absent or unavailable

☐ Attending the proposal review meetings

☐ Understanding that the presentation of a quality proposal to the customer is a shared responsibility and requires teamwork and cooperation

☐ Obtaining any necessary brochures or other

✔ It is crucial that each section author read the entire customer request to fully understand the customer's requirements. The Proposal Team should not expect the Proposal Manager to answer detailed questions about data available in the customer request.

documentation to be included in the proposal by no later than the mid-point of the production schedule

☐ Supplying rough art work for figures, charts, diagrams, etc., within five days following the Proposal Team Kickoff Meeting.

Electronic Transfer of Input

Whenever possible, written and graphic input is provided by the section author via electronic transfer (i.e., e-mail) or on disk. The primary software used by B&P is WordPerfect® for Windows™ for text, CorelDRAW!® for graphics, and Excel® for spreadsheets. Before creating text or graphics, section authors consult with the Technical Writer for the acceptable software formats.

Additional information on software formats and electronic file transfer will be available in the supporting document, **B&P On-Line File Management & File Transfer Guide** being developed by the B&P Process Management group.

Creating Graphics

Graphics -- figures, charts, maps, photographs, blueprints, etc. -- that a section author wishes to include must be specified on the Proposal Input Worksheet and rough-draft versions provided to the Technical Writer within five days following the Proposal Team Kickoff Meeting. Section authors develop graphics first because:

☐ Graphics take more time to generate and are more difficult to change than text

☐ Graphics are very important, perhaps more so than text, for summarizing information for the proposal evaluator

☐ Once the focus of the graphic has been determined, writing the text becomes easier.

Graphics communicate powerfully. They are one of the section author's most effective tools because they break up text and stimulate the reader's interest. And they often explain concepts more efficiently than a written description. A picture *is* worth a thousand words when you can save several pages of text -- and the evaluators' time -- by explaining something visually. As a section author ask yourself, "Can I better explain this visually?" If the answer is yes, then do it. However, keep in mind that one evaluator will skim the text and study the graphics, while another will skip the graphics and scrutinize the text. An integrated text and graphics approach will satisfy both. Some guidelines for using graphics are:

☐ Create graphics before you write text.

☐ Reference graphics in the text before they appear in the proposal.

☐ Orient graphics the same way the text is (vertically) so readers don't have to turn the page sideways to read them.

☐ Write action captions that convey a major system capability and its benefit to the customer. Use the following criteria for captions:

- Does it communicate what the graphic is and why it's there?
- Does it highlight the graphic's central message?
- Does it state a benefit?
- Does it help sell the proposed solution?

☐ Keep them simple. Don't try to make more than one point in a graphic.

✔ Never use as an original a graphic that is a photocopy of a photocopy of a photocopy (and so on), that is blurred, contains any illegible data, is a photocopy of a fax, or is not reproducible. Even one poor quality graphic can substantially reduce the quality of the proposal as a whole, leading inevitably to an unfavorable customer response.

☐ Ensure that the point of the graphic is clear.

☐ Include at least one key graphic per section, including the Executive Summary.

☐ Integrate the text with graphics so that they both work together.

☐ Eliminate extraneous detail and unnecessary graphics.

Using Boilerplate (Generic) Text

At the Proposal Team Kickoff Meeting section authors specify to the Technical Writer what boilerplate text they need. The boilerplate text will be generated and distributed by the Technical Writer within five days following the Proposal Team Kickoff Meeting.

Boilerplate text includes material used in previous proposals as well as generic text maintained in the B&P database. (Section authors may also have access to additional boilerplate in their own databases, from brochures, or from technical manuals.) Section authors are free to use boilerplate text when creating new input. However, it is important that boilerplate material be carefully and thoroughly checked and modified to ensure that it specifically responds to the unique customer needs as detailed in the customer request.

> ✔ Boilerplate text is never to be used verbatim without being checked, but must be modified in order to conform it exactly to customer requirements and expectations. References to countries, customers, and country-specific environments are corrected by the section author. Boilerplate is to be used to help the section author develop new input targeted to a unique and specific customer request and customer.

Writing Proposal Input

Natural proposal writers are rare. However, someone who is not naturally a good writer can still get all the facts on paper in a reasonably coherent manner. There are basic rules and assumptions section authors need to keep in mind:

☐ Section authors must be thoroughly familiar with the entire customer request and respond to every requirement.

☐ Section authors must be aware of the Account Team's customer strategy for the proposal.

☐ Section authors must thoroughly understand whom they are writing for (the evaluators) and how to write for them.

☐ Section authors must begin thinking visually early in the process (how to graphically depict what they are writing about).

☐ Section authors carefully devise a strategy for outscoring the competition based on the overall Account Team bid strategy.

☐ Section authors realize that the heart of effective proposal writing is the planning, visualizing, outlining, and brainstorming with Proposal Team members that occur before a first draft is produced.

☐ Section authors understand that they will shorten writing time, reduce stress, and ensure a higher probability of winning by using a structured writing process, such as:

- Creating and following a logical outline
- Writing to the evaluators
- Developing a winning strategy before you begin writing
- Responding to every requirement in the customer request
- Emphasizing customer benefits.

The final output should be a professional document which reflects the quality of the AT&T product(s) proposed. Remember, you are writing a technical *sales* document and you are selling AT&T. Every chart, graph, picture, heading, and title is an opportunity to sell your response. Here are some additional helpful writing techniques:

□ Start with an outline and work toward a draft.

□ Organize information effectively. Follow a pyramid-type structure: summarize at the top and provide details at the bottom.

□ Sometimes the evaluator reads only the first and last sentences in a paragraph. Open paragraphs with your most important ideas, and end them with a customer-oriented statement. Repeat important ideas in the summaries.

□ Make it clear why AT&T is the right choice:

- ▸ Use discriminators
- ▸ Use theme statements
- ▸ Use section overviews to summarize the content of the section
- ▸ Use headings that are informative, specific, and inclusive.

□ Avoid writer's traps:

▸ Needless jargon and acronyms.

▸ Vague or imprecise modifiers, such as *very*, *somewhat*, *almost*, and *virtually*.

▸ Needless and redundant phrasing, such as *combine into one* and *refer back*.

▸ Superfluous language, such as *at this particular moment of time*, *in the majority of ins*

▸ Passive voice: *The 5ESS® Switch is manufactured in the United States.* Instead, write actively: *We manufacture the 5ESS® Switch in the United States.*

▸ And finally, remember, English is a second language for most of our global customers. Therefore, sentence structure should be simple, concise, and easily understood.

□ Summarize key content:

- Summarize at every level of the response: In the Executive Summary, in sections, sul

- Extract key capabilities and benefits for summaries.

- Make the content and size of each summary reflect the importance of what it summarizes.

□ Create the rough draft quickly. When you have to create long pieces of text, do it quickly, without trying to be perfect the first time and without revising. During the writing of the rough draft, section authors often try to do too much at once. They generate ideas and connections, organize thoughts, draft sentences and paragraphs, review and revise paragraphs, check sentences for content and grammar, and check details like spelling and punctuation. Trying to do all of this on the very first writing effort can be overwhelming. Here are some dos and don'ts for generating the rough draft:

- Find a quiet place to work.

- Work from a full-page mockup. If you haven't already, write theme statements, headings, and subheadings. Use them as your framework.

- Begin where you feel most comfortable. Write the easiest parts first, and don't worry about writing in sequence.

- Write quickly and keep writing, even if it looks and sounds bad. It can be cleaned up later.

- Ignore errors and mistakes, leave yourself room and time for revision.

- Don't worry about organization. Do it later.

- Don't reread extensively. Read it when you've written all of it.

- Don't worry about wordiness. Clean it up later.

- Don't use your dictionary or thesaurus. Look it up later.

- Don't worry if it looks messy, it's only your first attempt.

- Don't revise. Ignore errors and keep going. Revise later.

☐ Learn to overcome writing blocks. If you get stuck, use brainstorming to loosen up. Try these techniques:

- Brainstorm through the block. Take out a blank piece of paper and write down anything that comes to mind.

- Talk out the problem. Talk to yourself out loud. Explain the problem and why you'r

- Reread the last paragraph you wrote to re-establish your train of thought -- but don't start revising!

- Check your outline and mockups. Put your ideas in context. Review the strategy an

- Change your writing environment. Stand up and write. Place the pad of paper on yo

- Name the paragraphs. Write the heading beside each paragraph to remind you what each paragraph is about. When you are creating draft text, it is often easy to lose yourself in details and forget the big picture. Naming each p

After you have created the first complete rough-draft, *now* go back and make corrections to spelling, grammar, style, and content, polishing the input until it is complete, concise, and accurate. Two good references for more writing tips are **The Bell Labs Style Guide** which offers sections on organizing your time and ideas, presenting scientific and technical information, etc., and the **Guide to RFP Success**.

Creating the Point-By-Point Outline

Immediately upon receipt of a registered customer request, the Technical Writer highlights all of the tender's major numbered and unnumbered headings. With the Proposal Manager's approval, the marked tender is submitted to Word Processing and the highlighted parts are typed, becoming the point-by-point response outline. The standard B&P point-by-point outline format is used except when a different format is specified in the customer request. (Additional information on proposal format will be available in the supporting document, **B&P Proposal Format and Style Guide** being developed by the B&P Process Management group.) Copies of the typed point-by-point outline are provided to the Proposal Team at the Proposal Team Kickoff Meeting as an aid in developing the responses.

Writing Point-By-Point Input

Written point-by-point responses are concise, direct, easily understood, and accurate. Responses are written to the proposal evaluators and emphasize customer benefits. Discriminators illustrating how AT&T's technology or commercial terms exceed customer requirements are included wherever possible. Try to avoid using the same boilerplate material repeatedly in the same point-by-point. Answer specific customer questions first, then reference additional information. Answer all parts of questions in the order given, using the same language as the customer. Avoid the excessive use of acronyms and identify them when they are used (e.g., Integrated Services Digital Network [ISDN]).

A proposal will be evaluated primarily by non-technical executives, as well as technical personnel. This is especially important to keep in mind when writing point-by-point responses. Responses are written with a marketing/sales slant, and not exclusively from a technical perspective. Offer the basic technical data, and give the customer benefits and advantages of AT&T's technology. Translate the technical data into terms a layman can understand.

Keep in mind, too, that in many instances proposals are required to be translated into the customer's language. All written input, and especially point-by-point responses, should be kept simple, to the point, and free of slang and excessively technical jargon.

When point-by-point responses are submitted on a piecemeal basis, slightly revised responses to the same point(s) are not to be continuously resubmitted. The first response submitted should be as complete as possible ("Once and Done!"). Revisions should be saved until the Proposal (Pink) Team Review, or when called for by the Technical Writer. The Technical Writer has the responsibility and authority to refuse (1) slightly revised repeated inputs, and (2) inputs that are illegible, incomplete, inaccurate, or otherwise unacceptable.

Typical Point-By-Point Responses

The point-by-point section provides a written response for every item set forth in the customer request. The items are listed in the exact sequence as they appear in the customer request. As a guideline for evaluating the customer request, an Customer Request Analysis & Assessment Process is included in Section 3. It is important for all the Proposal Team members to analyze the customer request carefully and completely before the development of point-by-point responses.

Unless the customer specifically requires otherwise, standard written responses, usually consisting of Comply, Understood, Do Not Comply, or Variance, are made for all points in this section of the proposal. These responses are defined as follows:

Comply -- This response means that the terms and conditions, equipment, and services offered fully meet the specification. In some cases, this response is followed by a clarifying statement to explain in further detail how compliance will be accomplished and in some cases exceeded, and why the customer should choose AT&T over the competition.

Understood (or Noted) -- This response usually indicates that the information-type statements in the customer request are clearly understood by AT&T.

Variance (or Exception) -- This response usually means that the equipment or services offered are not in full accord with the specifications. A statement is provided with all Variance or Exception responses explaining how the equipment, services, or terms and conditions differ from the specifications, and why AT&T is still the right choice for the customer.

Do Not Comply -- This response means that the terms and conditions, equipment, or services offered are not in accord with the specifications or requirements. A statement is provided with all Do Not Comply responses explaining how what is being offered differs from the specifications, and why AT&T's "non-compliant" response is still the right choice for the customer.

Other typical point-by-point responses include "Agreed To" and "Not Agreed To."

Author Reviews

After a section author's initial input has been edited and rewritten by the Technical Writer, copy edited, typeset, and proofread by the support staff, a "review draft" copy is made available to the section author for review. The section author uses this copy to make additional changes as needed, submitting the changed and corrected document to the Technical Writer, usually following the Proposal (Pink) Team Review. Section authors may submit changes at any time prior to the Gold Copy (final draft), but should not expect "fresh copy" to be generated each time.

First Draft copy is issued *prior* to the Proposal (Pink) Team Review, and corrected (Second Draft) copy is issued *following* the Proposal (Pink) Team Review for use in the Red Team Review. The final draft (Gold Copy) is issued following the Red Team Review. All changes submitted *after* the Proposal (Pink) Team Review must be approved by the Proposal Manager before being included in the proposal. Changes submitted *after* the Red Team Review must be approved by the Proposal Manager and the Stakeholders.

First Draft

The creation of a useful first draft requires that the Proposal Team adhere to the proposal Timeline. Each section author is responsible for providing information (rough drafts, point-by-point responses, graphics, etc.) to the Proposal Manager on or ahead of deadline. This will facilitate the work flow through Word Processing and graphics, and enable the Technical Writer to make effective use of the support staff. This will also reduce the need for overtime hours, reduce proposal preparation costs, and allow for thorough and careful editing and review of the document.

Additional Drafts

The number of complete proposal drafts required depends on two factors: Complexity of the proposal ; Time (customer-specified due date).

The First Draft is reviewed at the Proposal (Pink) Team Review. The second draft incorporates Proposal (Pink) Team Review changes and is reviewed by the Red Team. The Gold Copy incorporates the Red Team Review changes, as well as any other necessary final changes.

Re-Writing the Draft Executive Summary

The Account Team distributes the rough-draft Executive Summary to the Proposal Team at the Proposal Team Kickoff Meeting for the team to help establish the strategy and tone of the proposal. Following the Proposal (Pink) Team Review, the Account Team, Proposal Manager, and Technical Writer should look at the draft Executive Summary. Utilizing the principles presented in Section 6, they ask such questions as:

> ✔ Because of time constraints, to keep costs within reason, and to avoid the introduction of errors, the number of drafts should be kept to a minimum. More than three complete proposal drafts (First, Second, Gold Copy) is excessive and wasteful.

□ Does the Executive Summary truly present a condensed version of the proposal with a reasonable sales/marketing focus?

□ Does the first paragraph tell the reader the solution and greatest benefit of the proposal?

□ Are critical areas, special needs, and "hot buttons" of the customer addressed in the draft Executive Summary?

□ Has the proposal followed the themes originally stated in the draft Executive Summary? If not, what has changed and why?

□ Does the draft Executive Summary truly present a factual, easy-to-understand, and complete overview of AT&T's offer as stated in the proposal?

□ Have graphics been used effectively?

□ Does the draft Executive Summary clearly explain how AT&T will meet the customer's needs as specified in the customer request?

□ Is the draft Executive Summary convincing? Does it present AT&T as the right choice over the competitors?

□ Is the draft Executive Summary dynamic, interesting, terse, simple, direct, and to the point?

□ Does the draft Executive Summary "close the sale"?

The Technical Writer, working closely with the Account Team, and the Proposal Manager, is responsible for the final re-writing, editing, and polishing of the Executive Summary.

Writing the Draft Cover/Submittal Letter

The submittal letter is usually a courtesy to the customer, but may be specifically required by the customer request. It is brief and less formal than the proposal. It thanks the customer for the opportunity to submit the proposal, identifies what is to be sold, and reminds the reader of the terms under which the proposal was originally requested. The submittal letter neither summarizes the proposal nor functions as the opening component of the proposal. It explains the proposal's topic, its relation to other documents or projects, and the offer's limitations. It may also direct the customer to areas of particular interest. Other typical characteristics of the submittal letter include:

☐ Is usually only one page, never more than two pages, in length

☐ Is concise, to the point, and personal

☐ Clearly states the essential nature of AT&T's offer:

- The main system and/or service being offered
- The bottom-line price for the main offer
- Alternate offers and prices

☐ Points out special considerations made for the specific customer, e.g., reduced delivery intervals, "free" equipment or services, bottom-line discount, etc.

☐ Targets known concerns ("hot buttons") of the customer and highlights how and where these are addressed in the proposal

☐ For complex, multi-volume proposals, specifies the volumes and number of binders per set, and any associated separate documentation

☐ Highlights any time or other limitations or restrictions on the offer, or any unique terms and conditions.

The submittal letter is usually written by the Account Team. However, it may be written by the Proposal Manager or the Technical Writer with input from the Account Team. The writer is identified at the Proposal Team Kickoff Meeting, and, as with all other proposal-related text, the letter should be submitted to the Technical Writer for polishing.

Proposal Production-Effort Prioritization

Responses to customer requests (customer requests, RFIs, etc.) receive work-effort priority over all other B&P activities and are prioritized according to the following criteria:

☐ Customer due date as specified in the customer request (tender)
☐ Customer dur date for directed bid
☐ Customer due date for clarification questions or other sales request with a negotiable due date
☐ Ship date for review by in-country Sales as relative to the customer request specified due date
☐ Ship date for review by in-country Sales for directed bid
☐ Ship date for review by in-country Sales for clarification questions or other sales request with a negotiable due date
☐ Red Team review documents
☐ Pink Team Review documents
☐ Scheduled proposal work not impacting customer due date
☐ Unscheduled proposal work not impacting customer due date
☐ Stakeholder Approval forms*
☐ E-mail requests not impacting customer due date*
☐ Proposal Team Kickoff Meeting documentation*
☐ Stakeholders' Kickoff/End-of-Game Meeting documentation*
☐ Meeting minutes or other administrative items*

** These items should be prepared by Proposal Managers, Technical Writers, and secretaries, using WordPerfect for Windows for text, On Target for Timelines, and Excel for spreadsheets. These items should be produced by Word Processing only in an emergency, and should not be produced using UNIX.*

A Proposal Production-Effort Priority list, developed by the B&P Contracting, is posted/distributed weekly. B&P production and support resources (primarily Word Processing and other support services) are allocated to each proposal based on its ranking in this list. This list includes the proposal number, country, customer, value, ship date, Proposal Manager, and Technical Writer for each proposal. All changes in priorities must be negotiated and cleared through B&P Contracting.

Cross-Team Resource Sharing

If the "Region A Country Team" is overloaded with work, and the "Region B Country Team" is not, it is expected that "Region B Country Team" will provide whatever help is needed to "Region A Country Team." Each Proposal Manager and Technical Writer should be eager to offer assistance, and just as quick to ask for help when necessary. Proposal Directors are informed by Proposal Managers of sharing but do not need to approve cross-team resource sharing.

✔ While B&P is organized regionally with teams assigned to a specific country or group of countries, cross-region, cross-country, cross-team resource sharing is both encouraged and expected.

B&P Production Support

The Technical Writer tracks and supervises the submittal of text, graphics, and camera-ready copy to Word Processing, Visual Communications, Reproduction, and Translation. The Technical Writer is the sole interface between the Proposal Team and all B&P Production Support services and staff. The Technical Writer is responsible for:

☐ Making sure that all special instructions are in writing and that B&P Production Support personnel understand them.

☐ Retrieving all work as soon as it is completed.

☐ Informing B&P Production Support services supervisors as early as possible when:

- Heavy input is anticipated
- Special short-interval jobs arise
- Additional personnel will be needed for night or weekend work.

Word Processing

B&P Word Processing (WP) is responsible for providing typesetting (text composition), text scanning, and typing support exclusively to B&P. While the Technical Writer must be able to perform minor text changes independently of WP, the Technical Writer relies on WP for all major inputting of text and assisting in managing the proposal database. Technical Writers and all WP personnel must be familiar with PCs, DOS, e-mailing basics, and MS Windows™, proficient in both UNIX® and WordPerfect® for Windows, familiar with typography terms and concepts, know standard copy editing marks, and understand the basics of page layout and document publishing. The

Technical Writer tracks and supervises the submittal of text copy to WP, and is the sole interface between the Proposal Team and Word Processing.

When submitting text to WP, the Technical Writer is responsible for:

□ Making sure that all instructions are in writing and that WP personnel understand them. When text is being transferred electronically or is on disk, instructions must explain how to retrieve files and exactly what is to be done to them and with them. *Note: The Technical Writer is solely responsible for receiving and managing all e-mail files sent from section authors, and then placing them in the proper database subdirectory or transferring them to WP. WP is not responsible for receiving and managing e-mail files sent from section authors or sources outside WP. WP may occasionally choose to provide this service on an exception basis or in emergency situations.*

□ Submitting all text directly to the WP supervisor.

□ Retrieving all work as soon as it is completed (by the deadline requested).

□ Informing the WP supervisor as early as possible when:

- Heavy or complex input is anticipated
- Files are to be transferred to or from WP electronically
- Special short-interval jobs arise
- Additional personnel will be needed for night or weekend work.

□ Providing a copy of the proposal production schedule (Timeline) to the WP supervisor immediately after the Proposal Team Kick-off Meeting.

□ Ensuring that the hard copy text is properly, legibly, and clearly marked up using acceptable copy editing and proofreading markings (refer to **The Chicago Manual of Style**). WP is not responsible for formatting, corrections, or changes not properly marked or specified.

□ Specifying the location (path) of any boilerplate text that is to be used.

□ Completing the "Client Complete" portion of the Proposal Text Production form, attaching it to the text to be typeset, attaching any written instructions, and time/date stamping the input. The Proposal Text Production form requires the following information:

- Software format for the text (WordPerfect or UNIX)

▸ Technical Writer's name, room number, organization code, and phone number

▸ Proposal number and country

▸ The name and location (path) of the directory where the file is to be placed

▸ The name of the file as it is to appear in the system

▸ The specific, reasonable date/time the typeset text needs to be completed. "ASAP" or "Rush" are not acceptable.

☐ Adding work submitted for night processing to the daily WP work priority list which is submitted to WP by 3:00 p.m. and submitting all "overnight" work to WP by no later than 5:00 p.m. *Note: Text listed on the work priority sheet and submitted to WP by 5:00 p.m. will be completed by 8:00 a.m. the next day. Text submitted to WP after 5:00 p.m., whether or not it's included on the priority list, will not be completed until some time during the next day. Exceptions **must be negotiated** with the WP supervisor.*

☐ Retaining for a reasonable period of time all marked-up, original text input and copies of all written instructions to WP as backup in the event that questions or problems arise.

When processing text in WP, Word Processing personnel are responsible for:

☐ Making sure that all special instructions received are in writing and understood. WP is not responsible for incomplete or inaccurate instructions. *Note: If instructions are not in writing, the input is not acceptable and should be returned to the Technical Writer.*

☐ Placing all work in the pick-up trays as soon as it is completed.

☐ Informing the WP supervisor immediately when:

▸ Input is heavier or more complicated than was anticipated
▸ The job cannot be completed by the requested deadline
▸ Input is given directly to a specific WP individual or is not acceptable
▸ The PC, printer, or system problems occur.

☐ Ensuring that the text is properly, legibly, and clearly marked up using standard copy editing and proofreading markings (refer to **The Chicago Manual of Style**). *Note: Text not properly marked is unacceptable and should be returned to the Technical Writer.*

☐ Understanding the location (path) of any boilerplate text that is to be used, and copying text from the boilerplate file before making changes. *Note: Boilerplate text requests without file locations (path) are unacceptable and should be rejected.*

☐ Ensuring that a completed Proposal Text Production form is attached to the text to be typeset, and time/date stamped. *Note: If the form is not attached or not completed properly, it is unacceptable and should be returned to the Technical Writer.*

☐ Consistently completing all work:

- Exactly as it is marked
- According to all written instructions
- By or before the specified deadline
- Formatted according to accepted B&P guidelines.

Note: Any work not meeting these requirements is unacceptable and will be returned to the WP supervisor. ALL non-standard formatting requests will be forwarded to Stephen Clark.

☐ For each job, proofreading carefully ALL new keyed text inputs, changes, and corrections to ensure that all work was completed and completed accurately. *Note: Material not proofread is unacceptable and will be returned to the WP supervisor.*

☐ For each job, completing a "spell check", correcting all misspellings, and attaching a spell-check sheet to the completed job. *Note: Material not spell-checked is unacceptable and will be returned to the WP supervisor.*

☐ Ensuring that all electronic files are named appropriately, created or copied, and placed in the correct subdirectories exactly as specified by the Technical Writer. *Note: Files placed incorrectly, mis-named, overwritten, or otherwise "lost" will be reported to the WP supervisor.*

☐ Removing all temporary, junk, and duplicate files from subdirectories on a regular basis.

☐ Completing for every job the "Typist Complete" portion of the Proposal Text Production form and returning the completed forms to the WP supervisor.

Additional information on text formatting and marking, and on file naming and management will be available in the supporting documents, **B&P Proposal Format and Style Guide** and the **B&P On-Line File Management & File Transfer Guide**, being developed by the B&P Process Management group. Further information may also be found in the **B&P Manual**. Questions on formatting or procedures and related issues are to be directed to Stephen R. Clark (x3-2318), and questions on electronic file transfer and systems related issues are to be directed to Marc Hollander (x3-2261).

Visual Communications

The steps for submitting art work to Visual Communications are:

☐ Ensuring that the art work is properly, legibly, and clearly marked up.

☐ Assuring that a Visual Communications consultant completes a graphics request form which requires the following information:

- Technical Writer's name, room number, organization code, Social Security number, phone and fax numbers

- Proposal number and country

- The date/time the completed art work is needed.

Cover design requests are submitted within five days following the Proposal Team Kickoff Meeting, particularly if a unique design is required. Technical Writer selects one of the "standard" cover designs available, and specifies the appropriate modifications. Information needed for cover design specifications include:

☐ The full proposal title for the front covers
☐ The shortened proposal title for the spines (when necessary)
☐ The country and main product offering
☐ The binder size(s) being used
☐ The quantity of each size covers/spines needed
☐ The date/time completed covers/spines are due.

All proposal art work is subject to the approval of the Technical Writer. Graphics are done using CorelDRAW! software.

Reproduction

The steps for submitting camera-ready copy to reproduction are:

☐ Ensuring that the camera-ready copy

- Is in the proper order
- Is free of staples, paper clips, or odd-sized, heavy or folded pages
- Has slip-sheets inserted as needed, and
- That all edges of "paste-up" art work are neatly taped.

☐ Completing a reproduction request form, attaching it to the camera-ready copy to be printed. The reproduction request form requires the following information:

- Technical Writer's name, room number, organization code, and phone number

- The number of copies needed

- What size, type (3-hole, etc.), weight, and color paper is required

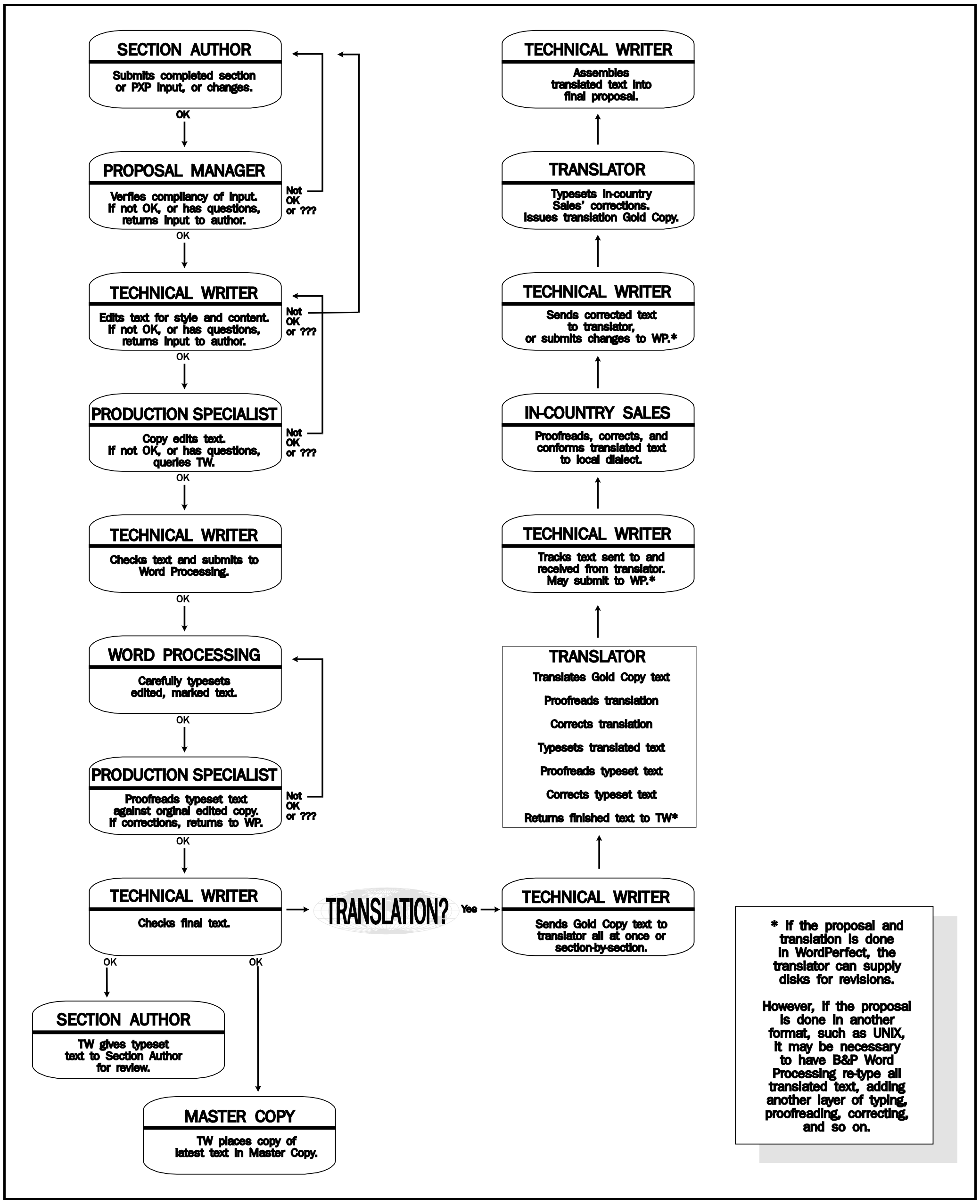
- The date/time the printing needs to be completed.

Translation

Having both the customer request and completed proposal translated is becoming increasingly commonplace, adding significant costs, time, and activity layers to the already complex B&P publishing process (see Figure 7-2).

> ✔ The costs of translating customer requests and proposals is borne by the BUs The need for translation must be identified to the Proposal Manager or Proposal Director by the Account Team at the time a customer request is registered, and a translator chosen and contacted within the 24-48 hours thereafter to gain resource commitments.

Translation consumes a considerable amount of time from both ends of the Timeline. The translation of customer requests and proposals can take up to four weeks each, and even longer. No work can begin before the customer request is translated, and all pre-assembly B&P production work, ideally, should be finished before proposal translation can begin.



This is a simplified view of the many layers input/changes must go through.
Figure 7-2

Translation is extremely labor-intensive and costly, particularly when section authors are late with inputs, or create churn with non-stop, often inconsequential changes. When "rush" translations are required, the costs skyrocket, the quality of the translation erodes, and the chance for error increases. If translation is required, it becomes even more critical that the Proposal Team strictly adhere to the Timeline and that last-minute changes are absolutely avoided. Also, it becomes more critical that all written and graphic input for translation be kept simple, and to the point.

Translation submission requirements include:

□ Specifying to the translator how translated material will be provided: faxed copy, on disk, e-mail, or hard copy.

□ Ensuring that submitted text is as complete as possible.

□ When necessary, ensuring that text is properly, legibly, and clearly marked up using acceptable copy editing and proofreading markings (refer to **The Chicago Manual of Style**).

□ Providing complete information, as required, to the translator, such as:

‣ Software format for the text

‣ Page formatting specifications

‣ Technical Writer's name, complete business address, room number, organization code, work phone and fax number, and home phone number

‣ Proposal number and country

‣ The name of the section as it is to appear in the proposal

‣ Any special, detailed, written instructions

‣ The date/time the translated text needs to be completed.

✔ Here are further tips to improve the translation process provided by one of our primary sources for translation:

1. Avoid acronyms and abbreviations. Always define them at least once.
2. Avoid "AT&T-ese" -- redundant, linky write-ups.
3. Always use WordPerfect for Windows. Avoid UNIX.
4. The Proposal Managers and Technical Writers must be accessible at all times during the translation process. Carry beepers if possible. Answer Audix messages immediately.
5. Avoid excessive, costly, time-consuming faxing. Faxed pages are difficult to read. Use e-mail or overnight express mail.
6. When estimating work, keep in mind that "a page is not always a page." Be as specific as possible about both the number and kinds of anticipated pages (text, tables, figures, charts, etc.).
7. Involve the translator as early as possible, and keep the translator fully informed. The translator is part of your Proposal Team, too!

The Technical Writer carefully tracks what sections have been submitted to and received from the translator, and whether the translated text is first translated-draft, corrected translated-draft, or final translated-draft.

Major Tasks Discussed in Section 7

Error! Switch argument not specified. **After the Proposal Team Kickoff Meeting**

- Section author writes input
- Proposal Manager verifies compliancy of input
- Technical Writer edits input
- B&P Production Specialist copy edits input
- Word Processing typesets edited input
- B&P Production Specialist proofreads typeset input
- Section author reviews input
- Technical Writer prepares First Draft of proposal
- Account Team revises Executive Summary
- Account Team writes rough-draft Cover Letter