

2014 OCTOBER 24
ATLANTA



When Winning is the Only Option



Ways to Make Your Proposal Department a WINNER!

*Automate Your Proposal Department... **Macro-mazing!***

Presented by Keith Lee

Macro-mazing!

Save Countless Man Hours and Tons of Money, on your Proposal Development Budget, the next time you respond to a Solicitation by Automating Parts of your Proposal Process.

Presented to: APMP Southern Proposal Accents Conference

Presenter: Keith Lee of 123 Proposal Automation Software, Inc.

Date: Friday, October 24, 2014



Covered Topics

- Automation Tips
 - Turn on the developer tab in Microsoft Word 2010
 - Get a list of over 1,850 pre-recorded macros
 - Create your own macros
 - Customize the Quick Access Toolbar (QAT)
 - Customize the tab/ribbon structure in Word 2010
 - Share your new automated tools with co-workers
- Other Topics
 - Advanced Automated Demonstrations that Save Valuable Time and Money

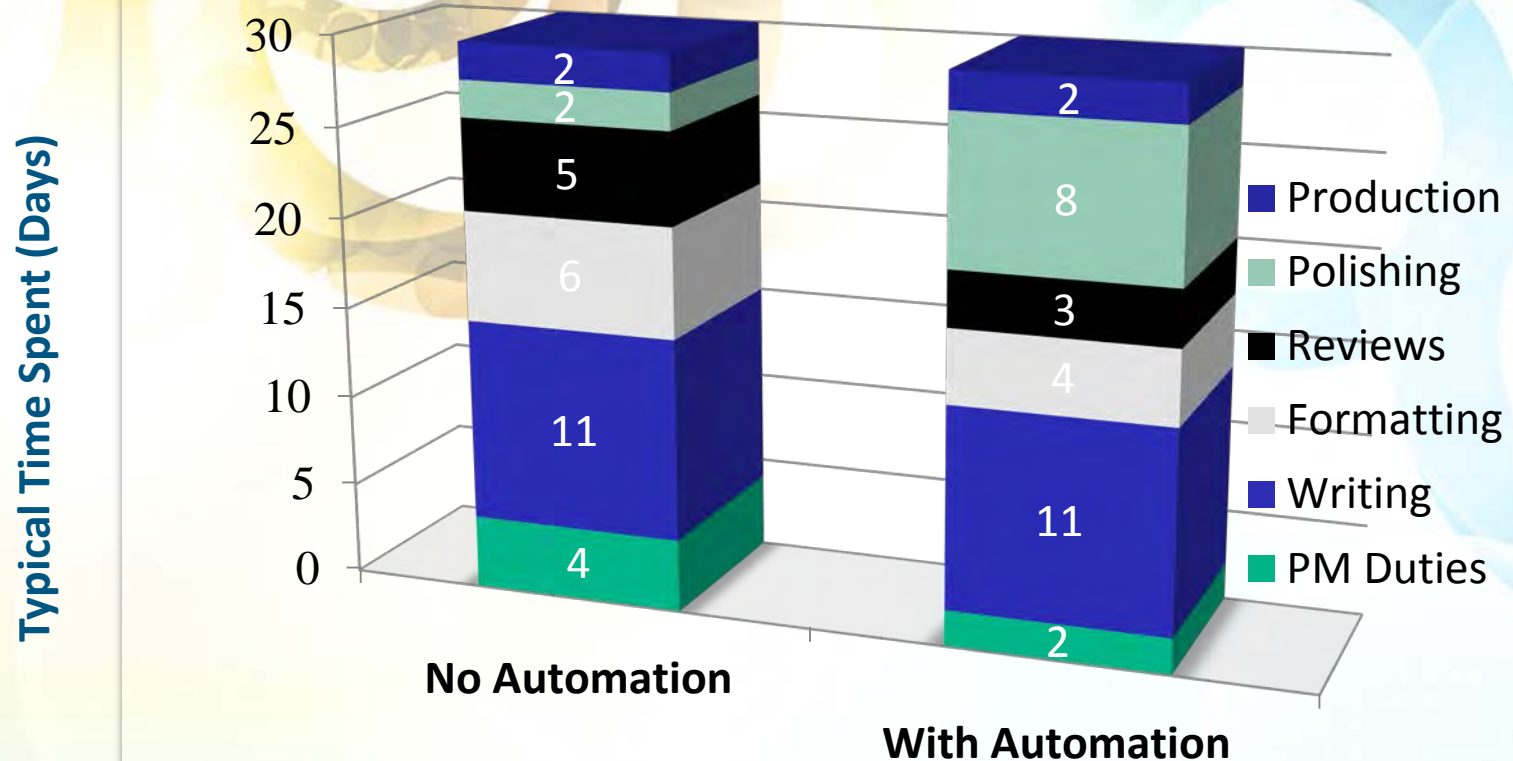


Why Automate?

- Why Should You Automate Your Proposal Process?
 - Simply Put...It makes your job **EASIER!**
 - It forces a consistent level of **Quality** regardless of the skill level of the end user
 - It saves **MONEY**
 - Most importantly, it frees up **TIME**, allowing the proposal team more time for **polishing** the proposal, making it more **compelling**

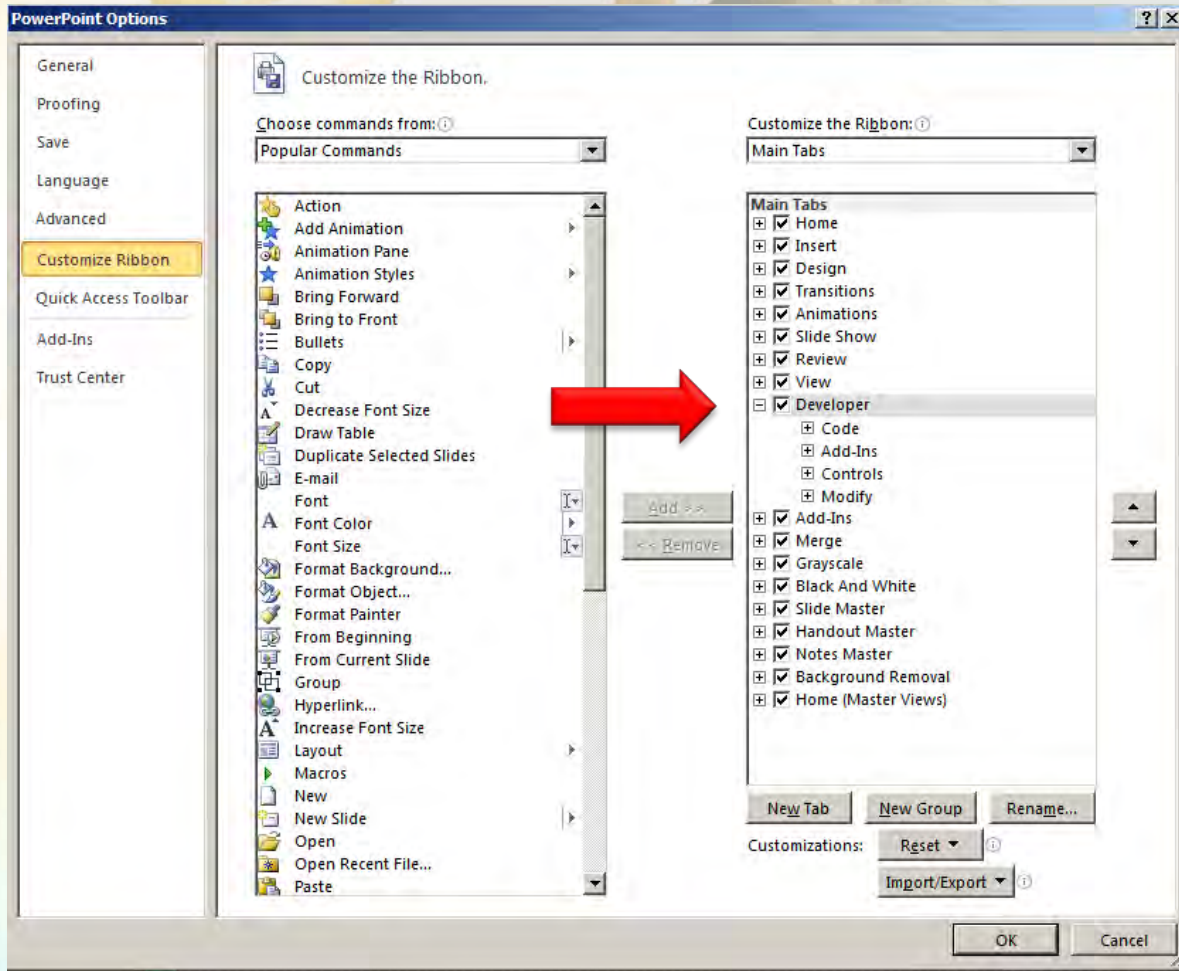


Spend More Time Polishing



Automation saves lots of time...Allowing more days for the "Polishing" Stage

The Developer Tab



- To Show The Developer's Tab in Word 2010
 - File
 - Options
 - Customize Ribbon
 - Developer

1,850+ Pre-recorded Macros

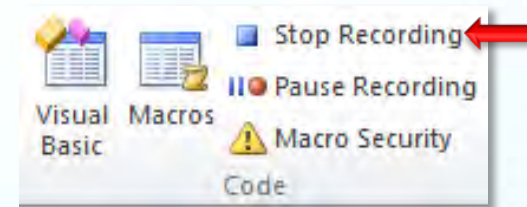
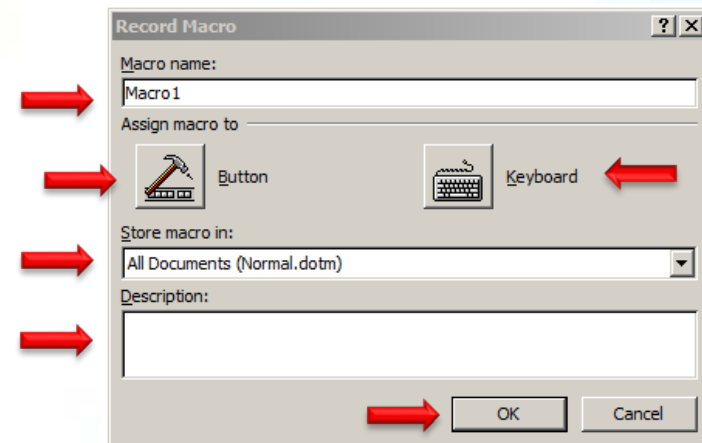
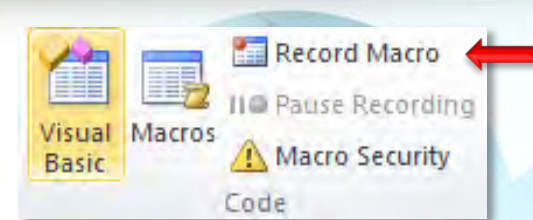
Command Name	Modifiers	Key
About		
Accept All Changes in Doc		
Accept All Changes Shown		
Accept All Conflicts in Doc		
Accept Changes and Advance		
Accept Changes or Advance		
Accept Changes Selected		
Accept Conflict		
Accept Conflict and Advance		
Accessibility Checker		
Activate Object		
Add Caption		
Add Digital Signature		

- Click the **View Tab**
- Click **Macros**
- Macros in: Select **Word Commands**
- Macro name: Select **ListCommands Macro**
- Click **Run**
- Dialog box: **All Word Commands**
- Click **OK**

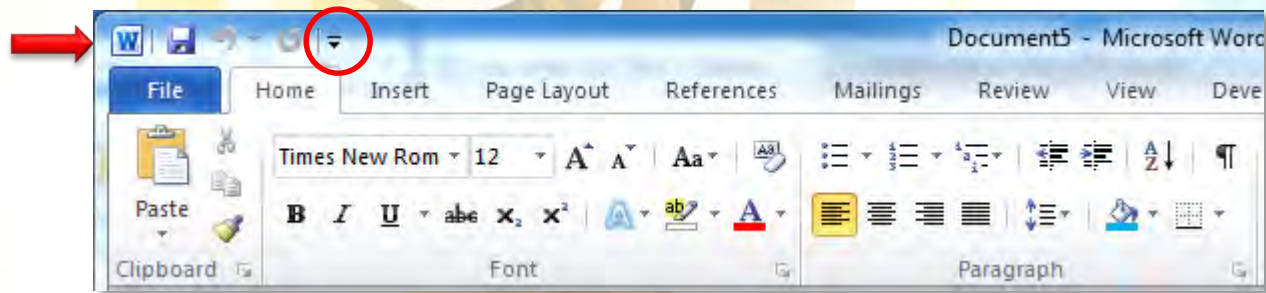


How to Create Macros

- On the Developer Tab
 - Click **Record Macro**
 - > Give it a “Smart” Name
 - > Assign the Macro to a “Button” or “Keyboard Shortcut”
 - > Store the Macro in a Template
 - > Give your Macro a Brief Description
 - > Click “OK” to Start Recording
 - > When Finished, Click “Stop Recording”
- » **Note:** *You can Combine Small Macros to Make Larger Macros*



Customizing the Quick Access Toolbar (QAT)



- **Default Location:** Top of MS Word's User Interface

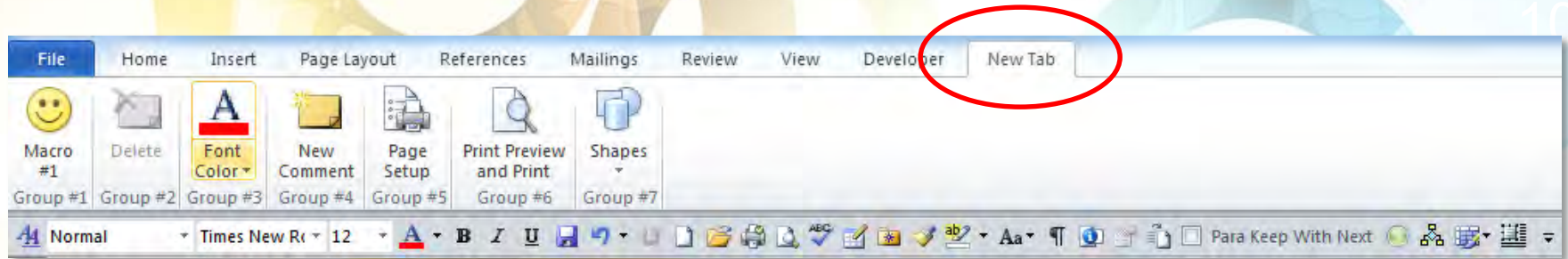
- > You can Customize the QAT by:

- Clicking the “**Down Arrow**” to the far right of the QAT and choosing an option

- “**Right-Clicking**” any Button on the QAT and choosing “**Customize Quick Access Toolbar...**”

- or by going to the “**File Tab**”, choosing “**Options**” and then “**Quick Access Toolbar**”

Customizing the “Tab/Ribbon” Structure in Word 2010



- **Location:** Top of MS Word’s User Interface

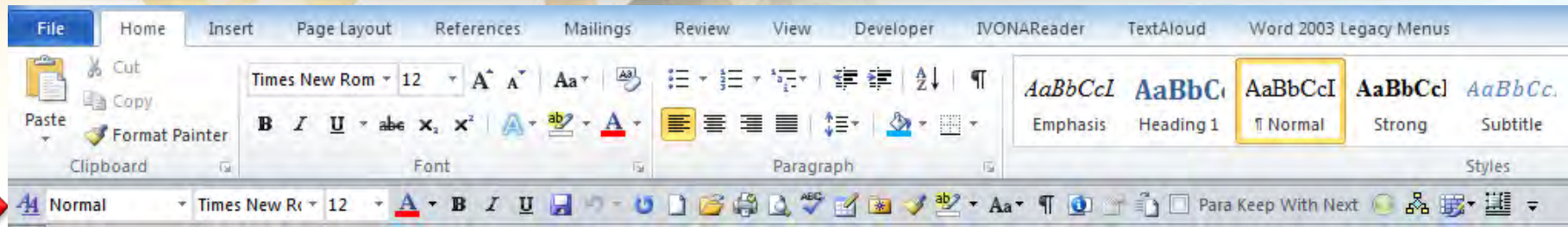
- > You can Customize the Tabs/Ribbon by:

- “**Right-Clicking**” any Tab on the Ribbon and choosing “**Customize the Ribbon...**”

- or by going to the “**File Tab**”, choosing “**Options**” and then “**Customize Ribbon**”

- From here, you can Add “**New Tabs**” and “**New Groups**” within each Tab

Sharing the Customized QAT and Ribbon with Others



- **Location:** C:\Users\User\AppData\Local\Microsoft\OFFICE\Word.officeUI
Note: The File and Location are “Hidden” by Default
 - > **Method #1**

You can “Copy” this file onto a different Computer System...allowing other Users to have access to your “Customized” QAT
 - > **Method #2**

Export your “Customized” QAT File to a location of your choosing and giving it a file name like “**Word Customizations.exportedUI**”...this is the Default Name

...Then Share this file with Others, so that they can **Import** this file and have access to your “Customized” QAT and New Ribbon Structure



Audience Participation

- If I Could Automate
????? that would
make my Life so
much Easier!



Advanced Macro Examples that Save Lots of Time

• **Generating an Acronym List:**

- > Most if not all Federal/Government Proposals “Require” an Acronym List to be submitted with each Volume, that lists each Acronym used, along with the Acronym’s Definition
- > A “Generic, Master Acronym List” that is updated from Time-to-Time and included in Each Proposal, is in most cases NON-COMPLIANT
- > Acronym Lists are usually Created during or after “Red Team Recovery”, because the Volumes are usually mature enough that the majority of the Acronyms are already in the document and only minor updates are usually done to the document at this stage (The COMPELLING Stage)
- > The Major Downside to Starting an Acronym List so late in the process is that they, 1) take a LONG time to create (1-2 Days for a Large Proposal) and 2) usually the DEADLINE for Submittal is only Days away.



Advanced Macro Examples that Save Lots of Time (cont.)

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- **Parse/Strip Sections L, M and C of the RFP:**

- > When the Final RFP is released, one of the 1st Duties that a Proposal Manager will have, is to Parse/Strip the Various Sections of the RFP into a Working, Annotated Outline. This can be a very Tedious and Time-consuming Process of “Cutting and Pasting” RFP Requirements from a Government-supplied Word or PDF Document into an Excel Workbook... Wouldn't it be nice to have a Macro that did this for you?

- » **Building a Compliance Matrix:**

- > The Proposal Manager also has the Time-consuming job of creating a “Compliant” Compliance Matrix, which shows the Relationships between the RFP Section, The RFP Requirement, and the Proposal Sections for L, M and C... Wouldn't it be nice to have a Macro that did this for you in just a few seconds?



Other Automation Ideas...

» Color Review Team Automation Tools

- > Allow Reviewers to assign a Ranked “Strength” or a “Weakness” to Selected Text in the Proposal
- > Collect Comments and Recommendation from Reviewers
- > Auto-Score each Section with Red, Yellow, Green or Blue, depending on the Comments the Reviewers made to the Document

» Desktop Publishing Automation Tools

- > Creating a File Matrix
- > Extract Tracked Changes
- > Clean/Unformat an Entire Document
- > Move Graphics around the Page while letting Text Wrap around them
- > Creating Focus Boxes and Callout Boxes
- > Inserting 11” x 17” Foldout Placeholders



Advanced Macro Examples that Save Lots of Time (cont.)

- » **Updating All Graphics with the Most Recent Versions:**
 - > At a minimum, during the Review Teams (Pink, Red, Gold) and during Final Production, the Desktop Publisher will have to Update all Graphics, in all Volumes, with the “Most Recent” versions...this can be a very time-consuming effort...especially for a Large Proposal that may have 50-75 Graphics, with various versions for each... Wouldn't it be nice to have a Macro that was able to Search the Document and Update all Graphics with the Most Recent Versions for you?

- **Formatting an Entire Document within Seconds:**
 - > This speaks for itself...



Thank You

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