

**Jean Roberts
Website Update**

April, May 2010

www.jeanroberts.com.au



(to be read while enjoying
your favourite coffee, tea or red wine!)

***Supporting small and
medium enterprises (SMEs)***
- *whether commercial or nonprofit*

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Examples of Jean's activities during April, May 2010

Consultancy and Training activity include:

- Nonprofit governance aspects for accreditation/registration
- Relationship between a nonprofit organisation's Constitution (Statement of Purpose and Rules) and their policies, procedures and work practices
- Facilitating a series of seminars on Successful Quoting and Tendering Techniques for the Australian Industry Group
- Project development and management
- Mentoring at management levels of commercial and nonprofit SMEs

Writing activity includes:

- New weekly website series Tools of War and Peace in the World of Management
- Preparation of the final chapter of my second e-book – My Spiritual Journey as an Independent Consultant – under 'e-books' on my website
- Re-introduction of my first e-book – Riding the Waves of Community Development in Australia – from the 1970s – under 'e-books on my website

Volunteer activity includes:

- Membership of the Nhill (Victoria) Aviation Heritage Centre Inc – with focus on the Nhill Aerodrome, an R.A.A.F. Training Base during World War 2 and an active aerodrome to this day.

Jean's Ten Core Business Strategies – each is a free download from www.jeanroberts.com.au

1. *Jean's Unshakeable Fact Test*

Don't believe everything you read, hear or are told

2. *The Art and Science of Business: Critical Success Factors – Jean's A-Z*

Don't ignore clear and factual signs that your business is not healthy, or your product is missing the mark

3. *Business Performance Indicators – Jean's Measures and Targets*

Always express your vision in practical terms as 'short-term achievable goals', with a set of annual performance indicators, measures and targets for each goal.

4. *Jean's Marketing Strategy for SMEs*

Be sure to consistently market your business – and your products/services, especially when you are at your busiest.

5. *Jean's Financial Risk Management - don't neglect your debtors*

Debtor relations is a key component in your Financial Risk Management Checklist

6. *Jean's Traps in Tendering and Outsourcing – when you know them, you can avoid them*

Improve your strike/success rate with tenders, submissions, grant applications, proposals, estimates, quotes.

7. *Jean's Business Brainpower – We all have it – so use it to improve your workplace*

This is the ability to manage problems, create opportunities and accept challenges.

8. *Jean's Project Mentality and Management - an effective business tool*

Michaelangelo is the mentor's mentor

9. *Jean's Retrospective Planning Tool –ensuring a solid basis for forward planning*

The future for your business may look uncertain, but you can be certain about how you got to where you are today. Retrospective planning ensures the benefit of hindsight!

10. *Jean's Strategic partnership relationships – checking the trust factor!*

The 'trust factor' can protect you and your business interests

Role of Project Manager

When preparing a submission, proposal or tender, it is most important clearly state how you intend the role of the Project Manager to be undertaken through the contract period.

The role of project manager is to ensure that the tender project is implemented successfully. The tender should give an assurance that the person designated as Project Manager will be in place through the duration of the contract period, or, in the case of replacement, that the project will continue to be managed by a person with an equal status and authority, and equally relevant qualifications, experience and skill.

The Project Manager's position and person description should include:

- a) status of the position within your organisational or divisional structure
- b) relevant qualifications, experience and skill of the person
- c) the nature and extent of authority delegated to this position to manage the project, identifying the position to which the Project Manager will report and be accountable
- d) standards and requirements to be met and maintained in complying with:
 - i. the tender brief, or request for quote
 - ii. your submission, proposal or tender document
 - iii. negotiated contract or agreement
- e) time allocated to management of the project/contract

Budget responsibility

It is critical that the Project Manager has responsibility for the project budget, with authority to manage the budget. Such authority should be delegated by a higher authority, with accountability to that higher authority. Budget reporting sessions should be scheduled through the contract period – closely aligned with agreed milestones.

Where there is to be a Project or Reference Group, details should be given in the submission, proposal or tender document about:

- the purpose, role, membership and responsibilities of such a Group
- working relationship between the Group and the Project Manager, and clear demarcation between their separate roles, authority, accountabilities and responsibilities
- schedules and procedures by which the Group will operate, and how these are expected to impact on the role of the Project Manager

Other responsibilities that need to be considered in project management include:

1. communication
2. decision-making
3. environmental issues
4. evaluation
5. financial transactions, cashflow monitoring, reconciliations
6. legal responsibilities and watchfulness
7. maintenance
8. negotiations
9. quality assurance
10. document management
11. reporting
12. risk assessment and management
13. safety and security
14. security and storage of equipment, supplies, information

15. supervision of project staff

16. variations

Definitions – can ensure clarity and avoid confusion

Definitions provide a valuable structure for internal discussion at governance, management or operational levels of activity, where:

- misinterpretation or misunderstanding may arise on key terms, concepts or practices,
- orientation and induction of new people at any of these levels is being planned,
- discussion gets 'bogged down' on details or differences – the process of agreeing on definitions can positively re-focus a discussion, or
- doubts arise as to implications of some options.

A series of definitions can be freely downloaded from www.jeanroberts.com.au

Here's a sample - *Jean's definition of a Case Study or Scenario*

A case study or scenario can be used in informal on-the-job training, coaching and mentoring. It can facilitate a structured one-to-one or small group discussion – or it can facilitate a structured discussion during a team or small staff meeting.

A case study or scenario is a metaphor. It is an example that can guide an informal but focused discussion among two, three or more people who have knowledge and understanding of a specific workplace situation – which could be a need, problem, opportunity or challenge.

The objective of this discussion is an improved understanding of either the situation, or options available for the 'next action'.

A case study is not a case history – a case history is a detailed and factual record of a specific situation or set of circumstances.

A scenario need not be factual – but it does need to be believable.

The need, problem, opportunity or challenge could be:

- agreeing on the value of a particular action or behaviour,
- responding to an unexpected event,
- assessing risk,
- encouraging innovation,
- testing the best language and style for a safety procedure,
- remedying a deficiency.

In preparation, ensure that:

1. the case study or scenario is prepared with a specific situation – and a specific group of people – in mind, and that a copy is provided for each person in the group (maximum of four brief paragraphs),
2. nothing is written into the case study or scenario that includes or infers any factual details of persons, time, place, incident or experience,
3. each person to participate in the structured discussion has adequate knowledge and understanding of the situation to be discussed with the aid of the case study or scenario,
4. privacy and confidentiality are protected,

5. respect is shown for all involved with or affected by the discussion, and
6. the case study or scenario is clearly presented, and readily connected with the situation.

Why Shakespeare?

*This is an extract from my 2008 book, **One Man Show – the smallest of small business**. In this book, I examine William Shakespeare's life as a one man show – a sole operator – an SME, and compare his experiences with my own.*

I have always been closely interested in the life and times of William Shakespeare. His knowledge, understanding and wisdom have opened and revealed the mystery and meaning of human nature to me on numerous occasions. As a business man, he worked for others, worked with others and worked alone: his work, words, wisdom and influence have survived and grown in value and impact through four centuries.

In the early 1990s, I saw a remarkable film titled Looking for Richard – totally focused on Shakespeare's play 'Richard III' – which I have since added to my DVD collection. A 20th Century Fox film, directed by and starring Al Pacino, it follows the cast and crew throughout rehearsals, eavesdropping on the behind-the-scenes process that goes into creating characters and mounting a production.

This film explains the plot and characters for me in circumstances where I have had to work with minimal knowledge or understanding of individual motives or agendas. I have often returned to this film to better understand such circumstances.

Two examples to underscore the value of Shakespeare's words and works:

- Immediately after having instructed the murder of a man who he considers a threat to his own path to the throne of England, Richard cunningly manoeuvres himself into the heart of this man's widow – even before the man is buried – and is able to convince her that she should marry him. Richard's reasoning included his need for a queen in order to be king, the widow Anne's need for protection, and his need to be seen to be an honourable man.

When Richard offers his ring, the widow hesitatingly accepts it in her deep sorrow. But, as she accepts the ring, she states matter-of-factly that although she takes the ring from Richard, she does not give her heart to him in return.

- The lesson here is to separate the actions of giving and taking. When something is given, it is not automatically taken in return. Extremely useful information for a *One Man Show* – in either role as giver or taker, buyer or seller.
- When crowned as King of England (with his wife Anne as Queen) following his ruthless use of murder, mistrust and mayhem, Richard turns to his loyal lieutenant Buckingham who has always supported and carried out Richard's instructions on his path to be crowned. Richard's instruction to Buckingham is to now kill the two young princes Richard has imprisoned in the Tower.

However, Buckingham's response to this request is that he needs to think about this instruction, and leaves the new King's presence to do so. Immediately, Richard recognizes that he has asked too much, that he can no longer trust Buckingham who he regards as no longer loyal. Richard immediately turns to another to undertake this instruction, and the two young princes die. The once-was-loyal Buckingham returns to Richard's presence and regretfully accepts the instruction, but Richard ruthlessly dismisses him, cancelling all earlier promises and rewards for loyalty and support.

- The lesson here is that a loyal lieutenant to a crafty and ruthless leader will have a level of loyalty beyond which his principles will not permit him to go – that

there is a time where s/he who had been a loyal lieutenant will withdraw that loyalty, and the withdrawal can be by either word, behavior or action.

In 2001, I discovered a further valuable resource in understanding the value in Shakespeare's words and works – a book titled Power Plays – Shakespeare's Lessons in Leadership and Management written by John O. Whitney and Tina Packer, published in 2000.

Their Prologue includes this introduction:

Shakespeare wrote one hundred fifty-four sonnets, several long poems, and thirty-nine plays. No other writer in the history of literature has displayed such a combination of industry and genius. Shakespeare wrote twenty-seven of his plays in one ten-year period; he finished the masterpieces King Lear; Macbeth and Antony and Cleopatra in fourteen months.

There is hardly a topic under the sun that he did not explore. Brilliantly. Good and evil, love and hatred, justice and mercy, pride and humility, guilt and innocence, war and peace. But the one subject he returns to again and again is leadership.

Then, in 2004, while considering how to share my experiences as a *One Man Show*, I became engrossed in a book I had bought as a Christmas present to myself titled In Search of Shakespeare - author Michael Wood and publisher. His book is a 2003 BBC publication to accompany the BBC television series of the same name.

In his prologue, Michael Wood states:

Shakespeare may be, as has been claimed in our time, the first modern man, the creator of our modern idea of personality, the 'inventor of the human', but he was also the last great product of the Gothic Christian West.

If great writers are made by their times, then to be born in 1564 was to be born in very interesting times indeed

In recent years, I've mentioned Shakespeare's name to people of many different cultures and nationalities, and almost always there has been an instantaneous expression of familiarity with his name – if not his words and work. Looking for Richard demonstrates this fact – and is an excellent introduction to his words and work, and to their relevance and value in our time.

In digging into Shakespeare's life, it is no surprise that by the age of 30 he was well established as an actor, poet and playwright. I believe this success was due to his personality, characteristics, abilities, passion and motivation as much as to his history, life and times.

His tenacity, his ability to capitalize on his life and times, and his intense knowledge and appreciation of the natural world, of human nature and of history enabled him to build and sustain his position as a role model, leader and mentor in his chosen profession – and as a source of learning, teaching, wisdom, reflection, courage and inspiration to a world outside of his profession.

He must have been a keen learner and observer since early childhood and who knows what methods he used to retain information. He certainly didn't have a computer on his desk!

Think of Shakespeare's words and work, his poems, his plots, his plays, his themes – and there you will see evidence of Shakespeare's world from his early childhood through early adulthood and into his final years – he died too young at 52.

There are detailed references to the world known to his parents:

- their respective family histories, livelihoods and traditions,
- close and not-so close threats to life and liberty through the destructive actions of people with powerful and political connections and intentions,
- dangers associated with travel, learning a trade, earning a living, establishing a home and family,
- the threat of disease and accidental or intended damage to body and mind which so often resulted in loss of livelihood and loved ones, or sudden or lingering death, and
- his formal education at Stratford Grammar School (Little and Big Schools), with his early love affair with the Latin poet, Ovid, and his ongoing romances with Greek and Roman history and historical events and records.

See Book Order Form, page 10, if you would like to purchase a copy of *One Man Show*

Checklist for reading a tender brief

The tender brief – sometimes referred to as the tender/bid document or specification – is a document (or set of documents) prepared by the tender-caller which details the specifications against which your tender will be assessed. A tender brief can be a number of separate booklets or documents available for a non-refundable fee, or it can be 1 page or it can be somewhere in between. Tender briefs are rarely light reading! They require and deserve intense concentration.

Here's a checklist of what to look for when first reading a tender brief:

1. background and role of the organisation calling the tender (*the tender-caller*)
2. background and context of the tender project
3. aim, requirements, specifications and required outputs or outcomes of the tender project
4. eligibility to tender
5. assessment or selection criteria and procedure
6. timeframe, logistics, milestones relating to the tender project
7. notional budget
8. constraints, restrictions, limitations
9. standards and quality of component, product, service, procedure or process
10. legislative or statutory requirements
11. contractual arrangements, including payment schedule
12. technical language or details
13. reporting requirements through the contract period
14. tender document pro-forma, or guidance for headings or sections in a free-form tender document

15. deadline and procedure for lodging the tender document

16. commencement date and procedure for implementation of the tender project

Any vital information or specification that seems to be missing may just have been overlooked rather than intentionally setting you a riddle to solve – so don't hesitate to raise such a question to the tender-caller. Check with the tender brief to find instructions on how to make such an enquiry. You can find the same with specifications, mandatory requirement and directions – they can appear as clear statements, sometimes as a hint, and sometimes written in technical jargon. These are essential pieces of information, so be prepared to ask for clarification.

It's wise to read the document through in one sitting, marking sections that need closer attention or analysis, or that you are uncertain about.

Here's a sample of what you should be looking for:

- examine the terminology, specifications, assessment criteria, conditions, timelines and any directions as to how you are required to structure your response
- identify key points, key words, implied instruction or direction, hidden implications, warnings, due date, etc
- any sections where you need additional information or clarification
- note any areas of preparation where you need external or additional assistance, advice, information, clarification, etc, to ensure a satisfactory response.

See Book Order Form, page 10, if you would like to purchase a copy of *Competitive Tendering - how to write a Competitive Tender*

3rd Edition – Successful Submission Writing for Business and Nonprofits
published December 2009 by Wilkinson Publishing Pty Ltd of Melbourne

This is the 3rd Edition of Jean's 1985 book, a proven and popular source of information, examples, tools and checklists:

- If you haven't written a submission before – the *10 Step Model for Successful Submission Writing* is still the focus of the book, with even greater clarity to each Step,
- If you are inviting submissions – this book provides a strong basis for developing assessment procedures and criteria, short-listing and selection
- If you are planning a 'bid' project – even more detail is given to assist in the stages of project design, development, costing, budgeting, scheduling and evaluation, all of which contribute to a positive, powerful and persuasive submission application
- If you are preparing to lodge a submission or grant application – great tips are included on drafting, editing & refining text, contributing to appropriate responses to questions
- If you are negotiating a submission contract or agreement – this crucial stage is expanded to ensure proper preparation in supporting your written application
- If you are implementing a submission project – the success of a submission is in the implementation of your project or bid!

Jean has more than forty years experience of being dependent upon successful submissions, and more than twenty years of lecturing on her systematic approach to the preparation and assessment of submissions. Her extensive practical experience includes:

- engineering company quotes, estimates and proposals,
- nonprofit funding and grant applications, and
- corporate sales – and internal – submissions.

See Book Order Form, page 10, if you would like to purchase a copy of *Successful Submission Writing for Business and Nonprofits – 3rd Edition*

JEAN ROBERTS LIBRARY OF ISSUE PAPERS - ABN 69 461 183 015

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SUCCESSFUL SUBMISSION WRITING – for business and nonprofits 3rd Edition (2009)	\$29.95 NEW Edition		\$
THE LEFT AND RIGHT BRAIN BUSINESS – linking organisational effectiveness with individual job satisfaction	\$35.00		\$
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