



Grow your business through targeted pursuits

Position to win – before the customer releases their request for proposal

An interactive online workshop in which you will learn how to select and position for winnable opportunities

Participants will learn a proven process for capturing strategic business opportunities in any industry. Gain essential knowledge and skills that will prepare you for qualifying opportunities and strategically positioning your organisation for successful bids.

Are you:

- ✘ Engaging too late with the customer?
- ✘ Working with individuals who need clarity about what to do in capture?
- ✘ Pursuing too many opportunities for too long?
- ✘ Gathering lots of customer intelligence but not sure how to use it?
- ✘ Coordinating multi-disciplinary efforts to advance your position with the customer?

Learn how to:

- ✓ Know when to step in to influence the customer's decision by understanding their buying process
- ✓ Effectively allocate responsibilities based on a clear definition of the roles of capture planning
- ✓ Make defensible bid/no-bid decisions using Pwin (the probability of win) to prioritise where you focus your efforts
- ✓ Build a Win Strategy tailored to the customer using simple tools to analyse and apply your knowledge
- ✓ Maintain progress towards a winning position by developing and executing a capture action plan

Who should attend?

- Capture Managers
- Opportunity Managers
- Business Developers
- Sales Professionals
- Sales Management
- Anyone who is responsible for capture planning and capture strategy.

"This online training format was exactly what I needed – it taught me proposal best practices, provided reference material and tools, and gave me a chance to practice what I learned and receive feedback. The format was perfect for my busy schedule and training needs."

This online, instructor-led course is delivered in four lessons over two days, with breaks during each day to complete case study exercises.

Feedback from a
ShipleyOnline™ participant



COURSE CONTENTS

Pre-Course:

- Review a customer opportunity case study
- Pre-workshop questionnaire

Lesson: Identifying and Qualifying Opportunities

Session Objective: Based on industry best practices, understand the role of the Capture Manager and the underlying process. Identify and qualify opportunities.

- Case study review
- What is capture?
- Capture Management roles/responsibilities
- Understand key decision gates
- Identify opportunities
- Align with the customer buying cycle
- Qualify an opportunity: The *Interest Decision*
- Understand the P^{win}
- Use an opportunity planner

Break 1 – Assignment: Use the P^{win} Calculator to calculate the case study P^{win} .

Lesson 2: Capture Planning

Session Objective: Understand the opportunity and your competitive positioning.

- Understand the **customer**
- Hot buttons
- Gaining customer intelligence
- Assess the **competition**
- Finding competitor intelligence

- Make the *Pursuit Decision*
- Complete an internal assessment
- Compare bidders
- Identify discriminators

Break 2 – Assignment: Update the P^{win} . Complete a bidder comparison chart.

Lesson 3: Developing the Win Strategy

Session Objective: Develop strategies for leveraging strengths, mitigating weaknesses, neutralizing competitors' strengths, and exploiting their weaknesses. Create an Action Plan to move your organisation forward.

- Develop the win strategy
- Write win strategy statements
- Run a Blue Team (strategy) review
- Make a *Preliminary Bid Decision*— a key decision gate
- Refine the win strategy
- Pricing to Win (overview)
- Resolve solution gaps
- Use teaming effectively
- Support the proposal effort
- Execute and present the action plan

Final Assignment: Prepare a short briefing to management outlining your capture plan.

Course evaluation

Application exercises are part of this online course. Learners are expected to complete all exercises within the timeframe of the course schedule.

WORKSHOP MATERIAL

- Shipleys Capture Guide
- Shipleys workbook with slides
- Tools and templates

