

Win more and stress less

Manage the bid team and process to produce targeted, high quality, winning bids

An facilitator-led online workshop in which you will learn to balance the tactical tasks of proposal management with leadership and management skills

This course will give participants a practical understanding of the roles, responsibilities, techniques and tools needed to manage a strategic sales proposal in any market. Learn key steps in proposal planning and execution, from understanding all requirements to assigning and managing contributors at all key milestones of proposal development.

Do you:

- ✘ Have to work with a multi-disciplinary team?
- ✘ Need a way to keep track of all the moving parts?
- ✘ Miss out on getting shortlisted?
- ✘ Struggle to get the team working to a common agenda?
- ✘ Find the capture strategy gets lost once the team starts writing?
- ✘ End up revising the final draft because it has drifted from the intended messaging?

Learn how to

- ✓ Understand best practice bid process and the responsibilities and skills required to fulfil the role of an effective proposal manager
- ✓ Develop a comprehensive Proposal Management Plan
- ✓ Maximise evaluation points by integrating compliance into your outline
- ✓ Inspire your team with an effective kickoff meeting
- ✓ Collaborate with all sales/capture team members to produce a winning proposal
- ✓ Maximise the quality of the proposal using effective proposal reviews

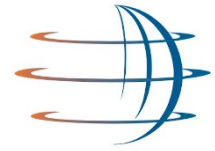
WHO SHOULD ATTEND?

- Proposal Managers
- Proposal Writers
- Business Development Professionals
- Anyone who is responsible for managing a proposal effort and overseeing proposal contributors.

"I took a lot of your teachings to heart, especially the pre-proposal planning, proposal development worksheets, and debriefing tips. As a result, my company had its best-ever month in new business acquisition ... I now have a win rate of over 60 percent!"

Corporate Proposal Manager

This online, instructor-led course is delivered over two days, with breaks between sessions on each day to complete brief case study exercises.



COURSE CONTENTS

Pre-Course:

- Case Study and Case Study RFP

Lesson 1: Managing the Proposal Planning Phase

Session Objective: Based on industry best practices, understand the importance of planning and the necessity to develop a comprehensive Proposal Management Plan (PMP)

- The opportunity lifecycle
- What makes a winning proposal?
- The Roles and Responsibilities of an effective Proposal Manager
- Primary roles and attributes for success
- Proposal Manager leadership competencies
- Case Study Review – Clarify understanding of the opportunity and requirements
- The Proposal Management Plan
- Purpose of the PMP
- Plan your proposal:
 - Compliance matrix
 - Proposal outline
 - Proposal schedule
 - Baseline solution

Assignment: Create an outline based on the RFP in the case study

Lesson 2: Proposal Strategy, Kickoff and Reviews

Session Objective: Plan for proposal kickoff by establishing win themes and writers' packages.

- Develop win strategies based on sales/capture planning information and assessment
- Know the customer hot buttons
- Review your competitive position and discriminators

- Extend capture strategies into proposal strategies
- Help shape or create a draft executive summary – understand its purpose
- Prepare writers' packages for all proposal contributors
- Prepare for and facilitate a proposal kickoff meeting
- Create a mockup
- Manage daily activities
- Prepare for and conduct a Pink Team review session
- Validate the bid decision – Are we positioned to win?

Assignment: Prepare a kickoff meeting agenda based on the case study and listen to kickoff meeting audio.

Lesson 3: Managing Proposal Development and Post-Submittal Activities

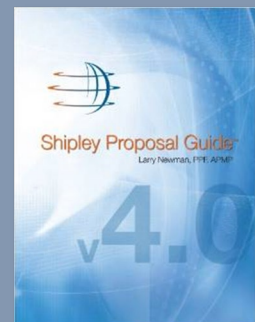
Session Objective: Provide leadership at each phase of proposal development and through contract award.

- Common Proposal Manager Challenges
- Guide customer focused writing - POWeR
- Facilitate the Red Team review
- Revise with the evaluator in mind
- Conduct a Gold Team review
- Plan production
- Track post-submittal activities
- Lessons learned

Assignment: Create a 30-day response schedule

WORKSHOP MATERIAL

- Shipley Proposal Guide
- Shipley workbook with slides
- Tools and templates



DIGITAL BADGE & ACCREDITATION

On completion of the workshop you will receive a **digital badge** which you can share via social media.

This training can also start you on the path to Shipley accreditations in the Proposal Management and Proposal Writing subject areas.



For more information about how to achieve accreditations, go to www.shipley-accredit.me