

## Win more and stress less

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

A 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



## COURSE CONTENTS

### Understand the proposal process

- Key decision gates
- The two guiding principles of Proposal Management
- The Proposal Manager role
- Establish the proposal team early
- Culture, competencies, skills and traits
- Participate in the Bid Validation Decision

### Build a Proposal Management Plan

- What's in a Proposal Management Plan?
- Develop a compliance checklist
- **Exercise:** Finding all compliance requirements
- Develop your proposal outline
- Cross-map all requirements to the outline
- **Exercise:** Creating a simple outline
- 5 Steps to early proposal planning
- Establish and manage to a Proposal Schedule
- Scheduling tools

### Develop win strategies

- Understand the baseline solution
- Confirm proposal strategies and themes
- Use Blue Team to review the existing win strategy
- Clarify customer hot buttons
- Evaluate yourselves and competitors from the customer's point of view

- **Exercise:** Updating the Bidder Comparison Chart
- Testing discriminators
- Strong discriminators drive proposal messaging
- Update win strategy to proposal strategy
- **Exercise:** Drafting strategy statements
- Update the Executive Summary
- Use the Executive Summary Planner and Organizer to embed customer focus

### Align the team

- Prepare Contributor Packages (CPs)
- Kickoff Meetings
- Establishing a page style – from outline to mockups
- Hold daily stand-status meetings
- **Exercise:** Reviewing a kickoff teleconference
- Apply a proposal review methodology
- Follow a consistent review process
- Coordinate Pink Team review

### Support development of proposal content

- Coach the POWeR proposal writing approach
- Facilitate an effective Red Team
- Revise your draft in three stages
- Facilitate effective Gold Team
- Proposal Submittal Decision

- Prepare for production and submittal

### Complete post-submittal activities

- Approach Final Proposal Revisions (FPR) or Best and Final Offer (BAFO) carefully
- Prepare for oral proposals/presentations
- Maintain proposal archives
- Identify and apply lessons learned

## WORKSHOP MATERIAL

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



## DIGITAL BADGE AND ACCREDITATION

On completion of this workshop and assessment, participants will receive a One Star badge in Proposal Management. The **digital badge** can be shared via social media.



Bid professionals can earn Two and Three Star Proposal Management badges through further assessments as they develop their knowledge and capabilities.

This training is also part of the pathway for certification in Shipley best practice. Shipley certification requires demonstrated understanding and skills in Capture, Proposal Management and Proposal Writing.



For more information about how to achieve certification, check out our website.