

Win more and stress less

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

An interactive online workshop in which you will learn to balance the tactical tasks 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

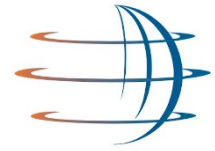
This online, instructor-led course is delivered in three lessons on a single day, with breaks between to complete a brief case study exercise. Following the workshop, participants complete and submit the final exercise after the course for review by a Shipleys consultant.

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! Thank you for the seminars that have proven so valuable to me, my company, and my professional future."

Corporate Proposal Manager



COURSE CONTENTS

Pre-Course:

- Case Study and Case Study RFP
- Pre-workshop questionnaire

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

Break 1 – 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?

Break 2 – 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

Final Assignment: *Due in one week:* Create and submit a 30-day response schedule

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

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

