

WELCOME

Proposal Vitamins to Boost Your Competencies

Learning Series 2 of 6



July 13, 2016

Planning with a Dose of Opportunity Qualification



Proposal Vitamin "P+"!

Assessing your Competencies

- Use the competency framework of the *APMP Proposal Practitioner Assessment Questionnaire (PPAQ)*
- Sources:
 - <http://www.apmp.org>
Certification menu => Practitioner
 - <http://www.apmp.org/?page=BOK>
APMP Body of Knowledge

Competency	Assessment Criteria	Application of Experience	or Delivery of Training	or Training Received	or Self Study	Assessor Guidelines
Schedule Development <i>Evidence in this competency of Procurement or supply chain experience is acceptable</i>	Schedule activities and plan resource for complex bids.	M1		N/A	U	Candidates <i>must</i> be able to evidence the following in this competency ALL Mandatory (M) areas <i>plus</i> 1 x Desirable (D) in either Application of experience or training received or delivered
	Develop budget for complex bids.	M2		N/A	U	
	Construct flowcharts to support the schedule.		D1		U	
	Schedule adaptively as circumstances change.	M3		N/A	U	
	Prepare own area of responsibility for the future.		D2		U	
Opportunity Qualification <i>Evidence in this competency of Procurement or supply chain experience is acceptable</i>	Contribute to pursuit decisions.		D1		U	Candidates <i>must</i> be able to evidence the following in this competency ALL Mandatory (M) areas <i>plus</i> 1 x Desirable (D) in either Application of experience or training received or delivered
	Drive and make preliminary bid decisions.		D2		U	
	Regularly contribute to validation reviews of the Bid / No bid decision.	M1		N/A	U	

Assessing your Competencies

Schedule Development

- Mandatory competencies:
 - Schedule activities and plan resources for complex bids
 - Develop budget for complex bids
 - Schedule adaptively as circumstances change
- Plus, ONE Desirable skill:
 - Construct flowcharts to support the schedule
 - Prepare own area of responsibility for the future

Scheduling Activities

Schedule backwards, starting with proposal due date and time.

Allow time¹ for writing, graphic design, and final review.

Writing	New:	4 pages/day
	Revisions:	8-10 pages/day
Graphics	Simple:	1-2 hours
	Complex:	2-6 hours
Final Review	New:	40 pages/day
	Boilerplate:	80 pages/day
Copy Editing	Editor:	10 +/- pages/day for seasoned/novice editor

¹ Source: APMP Body of Knowledge, <http://bok.apmp.org/bok/scheduling/>

Scheduling Activities

- Allow time for developing the proposal infrastructure for a smooth proposal process (from kickoff to production)
- Clearly explain the timeline to the team and avoid scheduling weekends and holidays
- Plan for sequential and parallel tasks (maximize the parallel ones!)
- Break large assignments into manageable pieces
- Ensure the schedule drives the daily priorities

Scheduling Activities

10-Day Schedule

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6
	RFP release	Kickoff meeting	Proposal strategy review			
Day 7	Day 8	Day 9	Day 10			
	Final document review	Production and quality control	Proposal delivery			

Source: APMP Body of Knowledge, <http://bok.apmp.org/tools-and-templates/>



Example: Proposal Schedule (Commercial)

Participants	Task List	RFP Issued	RFP Rec'd in Proposal Dept.	Bid / No-Bid Decision	Kick-off Call	SME Due Date	Final Review	Completed	RFP Due Date
Joe Downey (Sales Pro)	Heidi - draft Proposal								
Laura Hacker (Sales Associate)	Bette - manage SMEs, update draft, final draft review and production	03/14/16	03/21/16	03/21/16	03/22/16	03/28/16	03/30/16	03/31/16	04/01/16
Erik Anderson (Sales Manager)									
Ramona Burns (Relationship Manager)									

Need to budget your time by working backwards from the due date.

Example: Proposal Schedule (Commercial)

Participants	Task List	RFP Issued	RFP Rec'd in Proposal Dept.	Bid / No-Bid Decision	Kick-off Call	SME Due Date	Final Review	Completed	RFP Due Date
Joe Downey (Sales Pro) Laura Hacker (Sales Associate) Erik Anderson (Sales Manager) Ramona Burns (Relationship Manager)	Heidi - draft Proposal Bette - manage SMEs, update draft, final draft review and production	03/14/16	03/21/16	03/21/16	03/22/16	03/28/16	03/30/16	03/31/16	04/01/16

Adapt quickly to change within timeline. Have Plan B ready!

Example: Supporting the Schedule (Commercial)

Assignments:	Discuss these assignments on the kickoff call with the scheduled timelines budgeted to ensure on-time submission to the customer.
Relationship Manager (Mike)	Section 1 Min. Qualifications; Section 3 Financing
Sales Pro (Joe) Sales Associate (Laura)	Section 2 Account Structure ; Section 6 Pricing
SME (Sue from Product)	Section 4 Receivables
SME (Jim from Product)	Section 5 Payables
SME (Brook)	Section 7 References and Performance
Proposal Manager	Items in yellow highlight throughout document; will merge your responses into the master doc and will perform overall final formatting prior to final review.

Mentor Panel



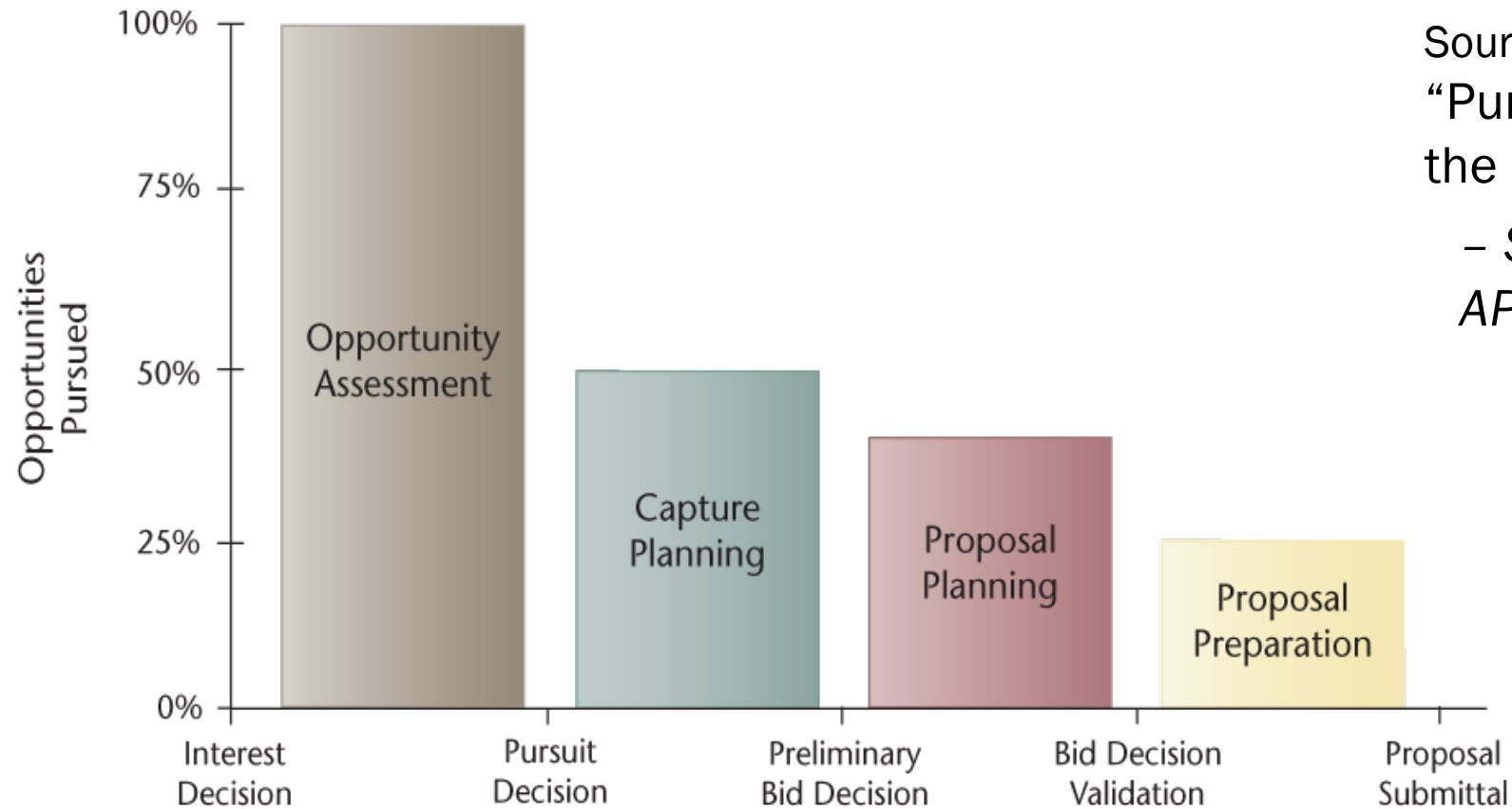
Proposal Vitamin "P+"!

Assessing your Competencies

Opportunity Qualification

- Mandatory competency:
 - Regularly contribute to validation reviews of the Bid / No Bid decisions
- Plus, ONE Desirable skill:
 - Contribute to pursuit decisions
 - Drive and make preliminary bid decisions

Disciplined Process



Source:

“Pursue or Don’t Pursue - It’s all in the Opportunity Assessment”

– Shipley Associates, June 2009
APMP Bid & Proposal Con

Disciplined Process

Contribute to pursuit decisions – be engaged!

- Drive preliminary bid decisions to identify gaps or show stoppers and raise the questions:
Do we want it? Can we do it? Can we win it?
- Direct regular validation reviews of the Bid/No Bid decision
- Initiate and make strategic decisions and sponsor new ideas
- Set organizational values when making decisions
- Create and sustain political coalitions to gain support and influence the outcome

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Erik Anderson (Sales Manager)	review and production								
Ramona Burns (Relationship Manager)									

When was the Qualification (Bid/No Bid) decision review meeting?

Other Bid / No Bid Resources

Article: “Knowing When to Say No to a Bid”

By David Browder, Principal, David Browder Group LLC

http://www.24hrco.com/images/articles/html/DavidBrowder_Sept11.html

Book: “Proposal Essentials”

By Jon Williams & BJ Lownie, Strategic Proposals



Mentor Panel



Proposal Vitamin "P+"!



Contact us:

apmpmentors@gmail.com

THANK YOU!



Join us August 3rd for the next Proposal Booster...

August 3, 2016 12 p.m. CT/1 p.m. ET
Proposal Vitamin "D" (Development)