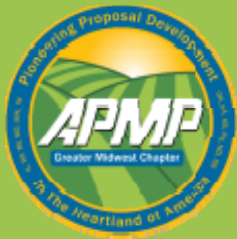


WELCOME

Proposal Vitamins to Boost Your Competencies

Learning Series 3 of 6



August 3, 2016

Proposal Development



Proposal Vitamin "D"

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
Proposal Strategy Development <i>Evidence in this competency of Procurement or supply chain experience is acceptable</i>	Identify how the customer perceives the organization.	M1	N/A	U	Candidates must show experience for this competency in ALL Mandatory (M) areas <i>plus</i> Candidates <i>should</i> be able to show experience of application, training received or training given in 1 x Desirable (D) Area
	Identify the customer's perceptions of the competitors.	M2	N/A	U	
	Identify the +ve and -ve discriminators for the opportunity.	M3	N/A	U	
	Develop proposal statements in a 'what' / 'how' format.	M4	N/A	U	
	Assign proposal strategies to individual proposal sections.	D1		U	
Executive Summary Development <i>Evidence in this competency of Procurement or supply chain experience is acceptable</i>	Collaborate with Senior Manager to write an early draft of the Executive Summary.	M1	N/A	U	Candidates <i>must</i> show experience for this competency in ALL Mandatory (M) areas
	Conduct a high-level review.	M2	N/A	U	
	Use the Executive Summary as a bid / proposal briefing tool internally and externally.	M3	N/A	U	
	Participate in the review and sign off of the final Executive Summary.	M4	N/A	U	

Proposal Development Competencies

Winning Price Development

Proposal Strategy Development

Executive Summary Development

Storyboard Development

Compliance Checklist Development

Assessing your Competencies

Winning Price Development

- Have THREE of the Six Desirable Competencies:
 - (D1) Influence and implement a top-down pricing strategy to meet the winning price
 - (D2) Plan ahead to negotiating stage
 - (D3) Manage the process for the business case of the approval and sign-off
 - (D4) Manage the production of the Pricing Strategy Document
 - (D5) Define cost drivers and pricing
 - (D6) Prepare estimating guidelines

(D1) Example: Top Down Pricing Strategy (Commercial)



Understand customer's operating cycles

- Obtain their last activity statement for volume levels
- What are their pain points?
- What are their motivators?

Winning Price



Understand your pricing structure

- What's worked/not worked on past deals?
- What incentives can you offer them?
- What value-add services can you provide?



Example: Manage the Process and Production (Commercial)

(D3) Manage the approval and sign-off process:

- Manage the schedule for the approval and sign-off
- Wear the “reviewer” hat to ensure what’s been promised in the written narratives matches the pricing footnotes/disclosures/terms

(D4) Manage the production:

- Ensure consistent format for the customer-ready version
- Ensure packaging requirements are met (i.e., Are separate, sealed envelopes required? Is it labeled correctly?, etc.)

Assessing your Competencies

Proposal Strategy Development

- Have FOUR of four Mandatory Competencies:
 - (M1) ID how the customer perceives your organization
 - (M2) ID the customer's perceptions of the competitors
 - (M3) ID the +ve (positive) and -ve (negative) discriminators for the opportunity
 - (M4) Develop proposal statements in a 'what' / 'how' format
- Have the following Desirable Competency:
 - (D1) Assign proposal strategies to individual proposal sections

Mentor Panel



Proposal Vitamin "D"

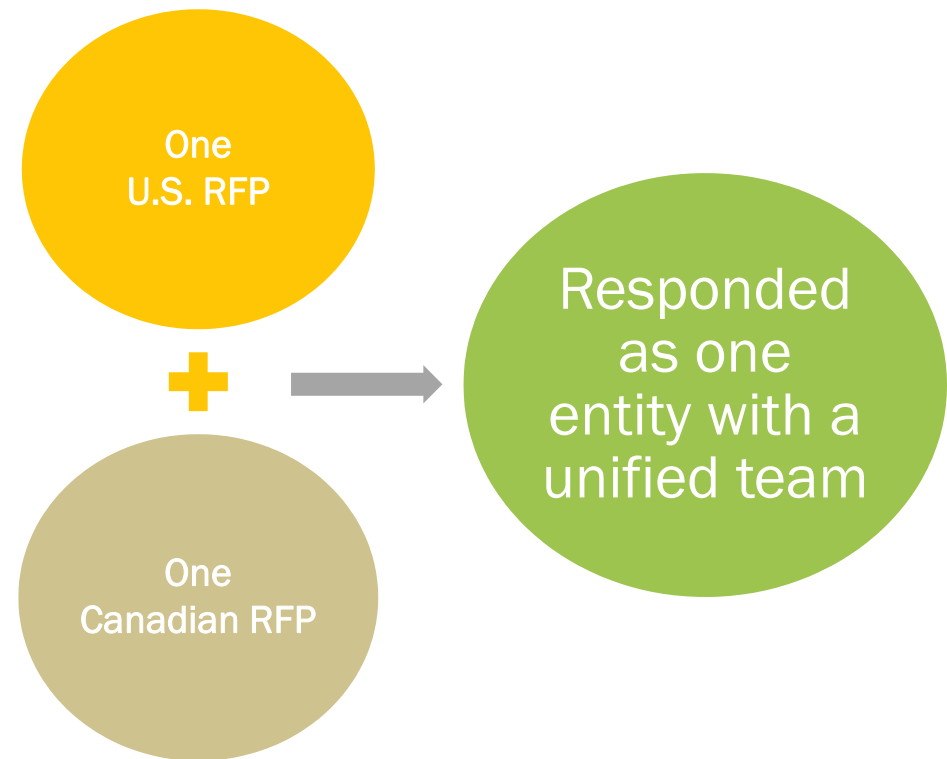
Assessing your Competencies

Executive Summary Development

- Have FOUR of four Mandatory Competencies:
 - (M1) Collaborate with Senior Manager to write an early draft of the Executive Summary
 - (M2) Conduct a high-level review
 - (M3) Use the Executive Summary as a bid/proposal briefing tool internally and externally
 - (M4) Participate in the review and sign off of the final Executive Summary

Example: Executive Summary Strategy (Commercial)

- (M1) Proposed combined strategy to Sales using “ISBP” approach. Outlined flow (customer’s objectives/desired outcomes, our CAN and US offerings, and our execution strategy as one North American provider to answer “Why us?”). Achieved agreement.
- (M2) Emailed Draft v1 to the team with reviewing instructions and editing deadline.
- (M3) Incorporated edits into v2. Shared at Touchpoint call that led to working united across all sections of response to ensure consistency in voice, style, format, answers and persuasiveness.
- (M4) Participated in overall review of Executive Summary, merged final changes and received final approvals before production.



Mentor Panel



Proposal Vitamin "D"

Assessing your Competencies

Storyboard Development

- Have SIX of seven Desirable Competencies:
 - (D1) Develop storyboards as a framework for the proposal
 - (D2) Drive the process to complete the storyboards
 - (D3) Communicate the win strategy for the storyboards
 - (D4) Decide upon the sections of a proposal that require storyboarding
 - (D5) Assign team members to complete the storyboards
 - (D6) Review the content of the storyboards
 - (D7) ID supporting information required for the storyboards

Example: Storyboard (Commercial)

(D1) Develop storyboards as a framework for the proposal

Executive Summary	1
Introduction	1
The BMO Harris Advantage James some fill-ins needed	1
Commitment to Execution.....	3
Solution Details	4
Response to General Information Requirements James #5-6 Travis #4 (Biographies- Banking Coordinator, too) and #6 (3 references)	4
Response to Scope of Services Questions James #2-5, 6a-c, 7, 8, 10, 15, 16, 20, 22 Travis #6a-c	12
Confidential Appendices	51
Appendix A: Pricing Pro Forma (non-redacted) Bette place approved pricing here	51
Appendix B: Sample Online Banking Reports	52

Example: Storyboard (Commercial)

(D3) Communicate the win strategy for the storyboards

Trusted advisory support with a dedicated team experienced in your industry



Win theme call outs



BMO Harris Bank has the Expertise, Resources, and Technology to be your strategic partner.
We're here to help.

Our commitment to <<CLIENT>> emphasizes the importance of our relationship and the efforts that we will deploy to ensure you receive not only the appropriate services but also a great client experience. Your account will receive personalized attention from our Premier Client Service model – **we will assign a dedicated Senior Client Service Advisor** **[DELETE/TWEAK if not using this approach]** to <<CLIENT>> who will be your primary contact for your daily treasury and payment needs.

The BMO Harris Advantage

BMO Harris Bank has been a leading provider of treasury and payment solutions for more than 65 years and is positioned well to deliver value-added ideas, competitively priced solutions, and trusted advisor support with our dedicated team approach. Our team of experienced bankers can provide guidance, insights, and ideas to help you meet your strategic goals.

<<CLIENT>> will recognize the following key benefits with a BMO Harris Treasury relationship:

- **Your Single Source Provider:** We have the technology, safety, and yield to provide you with the banking services requested within the scope of this RFP.
- **Proactive, Consultative Approach:** We will proactively inform you of any changes, updates, and benefits in the products and services we offer and will leverage our experience and knowledge of the **Not-For-Profit** industry to assist you in managing cash-flow more efficiently.



Assessing your Competencies

Compliance Checklist Development

- Have FOUR of four Mandatory Competencies:
 - (M1) Assess the customer evaluation and weighting criteria for the bid
 - (M2) Strip complex requirements and build complex compliance matrices, listing each requirement separately
 - (M3) Define strategies and plan alternative courses of action to accommodate non-compliance.
 - (M4) Monitor compliance of the bid throughout

Assessing your Competencies

Compliance Checklist Development (continued)

- Have ONE of two Desirable Competencies:
 - (D1) Discuss compliance with the customer and effectively communicate compliance requirements to team.
 - (D2) Facilitate regular internal compliance review meetings.

Example: Compliance Matrix

	A	B	C	D	E	F	G	H	I
1	Headings for Compliance Matrix			Compliance Matrix					
2	Customize the content of your compliance matrix to customer instruction, the opportunity, and team needs. A basic compliance matrix generally starts out with Columns A to I.								
3									
4	If you plan to extend your compliance matrix to provide guidance to writers (i.e., a topical outline), you can include information in columns J to N.								
5	Generally Used								
	Section (section number of each question)	Section/subsection title (identifies each question or requirement)	Page (where each question is found)	Requirement (stated with active verb)	F (fully comply)	P (partially comply)	N (does not comply)	Response Reference (references name and page number of documentation that you supply as part of the response)	Comments
6									
7									
8									
9									
10									

J	K	L	M	N
Used for contributor assignments and tracking				
Contributor	Section themes and strategies	Discriminator(s) and proof point(s)	Visual and page allocations	References to potential customizable reusable content

Resources - <http://bok.apmp.org/tools-and-templates/>

APMP BOK // TOOLS AND TEMPLATES

Tools and Templates

- Achievement Tracking Register
- Action Item Tracking Matrix
- After-Action Review Template
- Bidder Comparison Matrix Samples And Instructions
- Budget Template
- Checklist for Internal Lessons-Learned Review
- Checklist for Writing Effective Headings
- Checklist of Questions for Customer Debriefing
- Compliance Matrix
- Contact Plan
- Content Plan Template
- Cost and Pricing Submittal Instructions
- Customer Analysis and Competitor Intelligence Data Sources
- Customer Question Tracking Sheet
- DCMA Adequacy Checklist
- Editing Checklist
- Fix Nominalizations
- Fix Passive Voice
- Fix Redundant Pairs
- Four-Box Template
- Graphics Development Log
- Incumbent Assessment Worksheet
- Key Information Summary Sheet Model
- Kickoff Planning Checklist
- Notional Comment Form
- Notional Team Review Agenda
- Opportunity Plan Template
- Oral Proposal Planner
- Page and Document Design Terms to Know
- Partner Selection Table Template
- Past Performance Template
- Persuasive Writing Checklist
- Plain Language Checklist
- Position Description Template
- Production Checklist
- Production Resources Checklist
- Proof Points Tracking Checklist
- Proposal Responsibility Matrix
- Proposal Summary Sheet
- Quality Management Inputs, Tools, and Outputs
- Quality Standards for Proposal Production Plan
- Response Matrix



Mentor Panel



Proposal Vitamin "D"



Contact us:

apmpmentors@gmail.com

THANK YOU!



Join us August 24th for the next Proposal Booster...

August 24, 2016 12 p.m. CT/1 p.m. ET
Proposal Vitamin “M” (Management)