

WELCOME

Proposal Vitamins to Boost Your Competencies

Learning Series Finale

September 28, 2016



REGISTER

PLAY TO WIN REGIONAL SYMPOSIUM OCTOBER 3 - 4, 2016

REGISTER TODAY FOR OUR FOURTH ANNUAL SYMPOSIUM!

Location

Hilton Garden Inn O'Hare, Des Plaines, Illinois | Group Rate: \$149 ([click here to reserve your room today](#))

Date

October 3- 4, 2016 (evening networking reception on 3rd, and all-day educational sessions on 4th)

Session Topics

Winning as the Underdog - David Bol

Applying Endurance Training to Best Practices in Proposal Preparation - Mark Wigginton

Quality Play Book: Formatting and Editing Checklist - Brittony Martin

Five Forces That Help You Win! - Randy Richter

Keeping Score: How Do You Measure the Capture Team's Performance? - Brandi Steckel

Steve Bartman, the Chicago Cubs, and the Science of Happiness - David Sotolongo

Prep for Success: Strategies to Develop Your Winning Team - Erin Thedwall

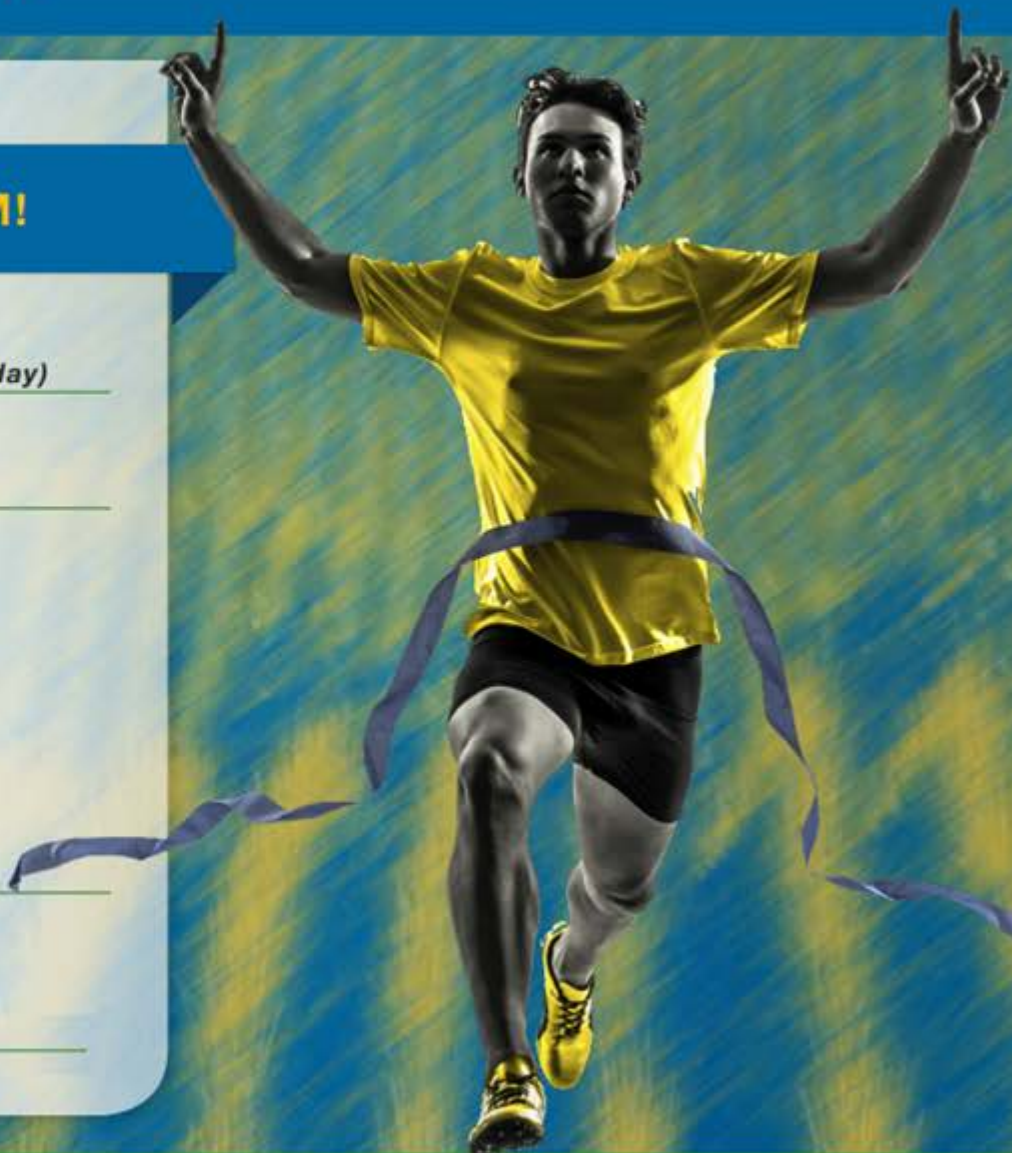
Extreme Slide Makeovers - Bruce Farrell

IMPROVing Communications - B.J. Lownie

Symposium Registration - [click here to register](#)

Early Bird Registration \$160 for members/\$190 for non-members

Regular Registration (August 31 through October 3, 2016): \$190 for members/\$210 for non-members



REGISTER NOW AT WWW.APMPGMC.ORG

Assessing your Competencies

- Use the competency framework of the *APMP Proposal Practitioner Assessment Questionnaire (PPAQ)*
- Resources:
 - <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
Client Interface Management <i>Evidence in this competency of Procurement or supply chain experience is acceptable</i>	Work with sales and have access to the customer to discuss high-level and operational levels aspects of the bid.		D1		U	Candidates <i>must</i> show experience for this competency in 3 x Desirable (D) areas in either application of experience, training received or training delivered
	Participate in resolution of issues with the customer.		D2		U	
	Strategically manage communication related to the bid with the customer.		D3		U	
Building Strategic Relationships <i>Evidence in this competency of Procurement or supply chain experience is acceptable</i>	Develop and use collaborative relationships to facilitate the accomplishment of work goals.	M1		N/A	U	Candidates <i>must</i> show experience for this competency in ALL Mandatory (M) areas plus Candidates <i>should</i> show experience in application, training received or training delivered in 1 x Desirable area
	Develop direction and involve others through working collaboratively with the team and regularly sharing important/relevant information.	M2		N/A	U	
	Seek and expand original ideas, enhance others' ideas, and contribute own ideas for the issues.		D1		U	

Sales Orientation



Proposal Vitamin "SO"

What is “Sales Orientation”?

Client Interface Management

Capture Plan Development

Negotiation Planning

Sales Participation

Assessing your Competencies

Client Interface Management

- Have all THREE of the following Desirable Competencies:
 - (D1) Work with sales and have access to the customer to discuss high-level and operational level aspects of the bid
 - (D2) Participate in resolution of issues with the customer
 - (D3) Strategically manage communication related to the bid with the customer

Have a Contact Plan

WHO	Who you're going to visit and who from your company will attend
WHAT	What you're trying to find out from the customer and what message you want to communicate to them
WHEN	When you will visit
WHERE	Where the meeting will take place
WHY	Why you want to meet with this customer—what you hope to accomplish
HOW	How you're going to communicate your message to them

Collect Key Information

Sample Summary Sheet

Buyer wants	Consolidated systems, efficiency and cost savings
Competitor offers	X product with minimal support and robust reporting
Our win themes	Dedicated support, free enhancement releases, electronic report delivery with consolidated account view
Risks/buyer worries	Business continuity, reliability, and safety
Top evidence points	Awards won: X, Y, Z
Our innovations	New release will guarantee X and Y

Improving Your Client Interface Management

If you have never been involved yet...

- Ask the Account Manager [Sales Lead, Capture Manager] if you can participate on the sales call:
 - Approach it as a 'listen only mode'
 - Use it as a job shadowing experience
 - Observe, actively listen, take notes, document action items
- Maybe use it as a pilot test, see how it goes, and gradually change the mindset ... and your process!



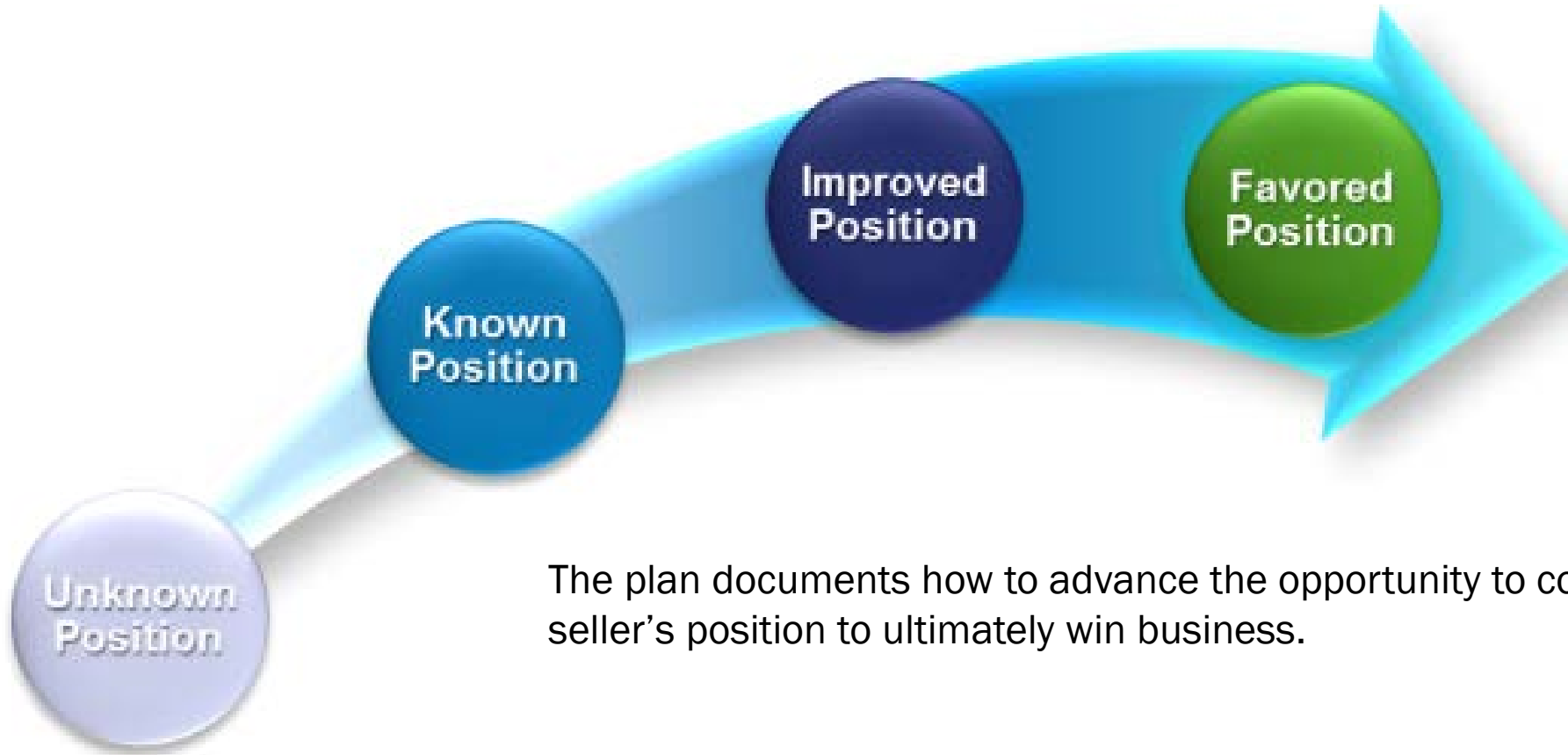
Assessing your Competencies

aka ... Opportunity Plan

Capture Plan Development

- Meet these Mandatory Competencies:
 - (M1) Use the Capture Planning process and information to drive the proposal
 - (M2) Ensure the Capture Plan contains actions that will advance the proposal
- Have TWO of the four Desirable Competencies:
 - (D1) Create a Business Capture Plan
 - (D2) Use the Capture Planning process adaptively for all types of customers and opportunities
 - (D3) Ensure the Capture Plan is maintained and evolves throughout the proposal timetable
 - (D4) Define specific actions to implement the Capture Strategy

The Opportunity Plan



The plan documents how to advance the opportunity to consistently improve a seller's position to ultimately win business.

Source: <http://bok.apmp.org/bok/opportunity-plans/>

The Opportunity Plan



- Drives and tracks all opportunity/sales activities
- Provides information for gate decisions
- Briefs review teams (competitor, opportunity, proposal strategy review teams)
- Helps the core proposal team develop the proposal plan
- Creates content and lessons learned that can be used in subsequent pursuits

Improving Your Capture Plan Development

- Evolve continuously as new content is added – guide the process with a standard structure
- Use all available tools (in the Body of Knowledge):
 - Customer contact plans
 - Bidder comparison matrices
 - Action item trackers
 - Strategy statement templates
- Develop the plan collaboratively with the customer to improve your position (*or reveal unlikelihood of being a favorite*)



Assessing your Competencies

Negotiation Planning

- Meet ONE Desirable Competency:
 - (D1) Participate in the early definition of the negotiating strategy



Improving Your Negotiation Planning Competency



Vitamin "SO"



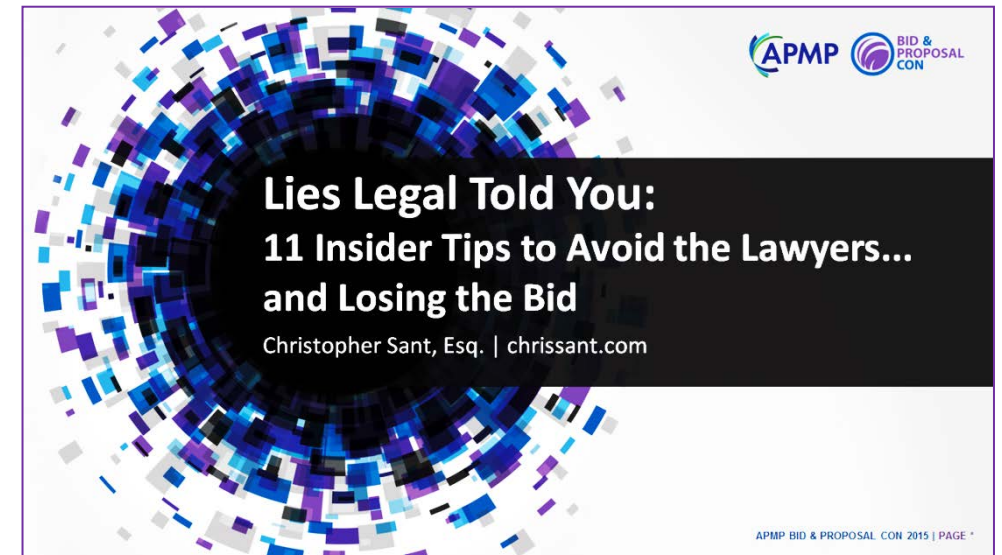
Improving Your Negotiation Planning Competency

- A contract must have all three elements: Offer, Acceptance, Consideration
- If you don't want it to be a binding offer, add this disclaimer:

“This proposal is an invitation to negotiate and is not a binding offer.”

OR

“This proposal is a good faith invitation to negotiate and is not a binding offer.”



Source: http://www.apmp.org/global_engine/download.asp?fileid=100D8F50-922D-4280-B48F-AC4854F7CD79&ext=pptx

Assessing your Competencies

Sales Participation

- Have TWO of the three following Desirable Competencies:
 - (D1) Use different sales approaches adaptively to suit the organization and the customer
 - (D2) Work with a sales team to influence the customer
 - (D3) Participate in sales strategy development



Mentor Panel



Proposal Vitamin "SO"

Behavior and Attitude



Proposal Vitamin "BA"

What is “Behavior and Attitude”?

Communication and Persuasiveness

Quality Orientation

Building Strategic Relationships and a Successful Team

Decision Making and Delegating Responsibility

Assessing your Competencies

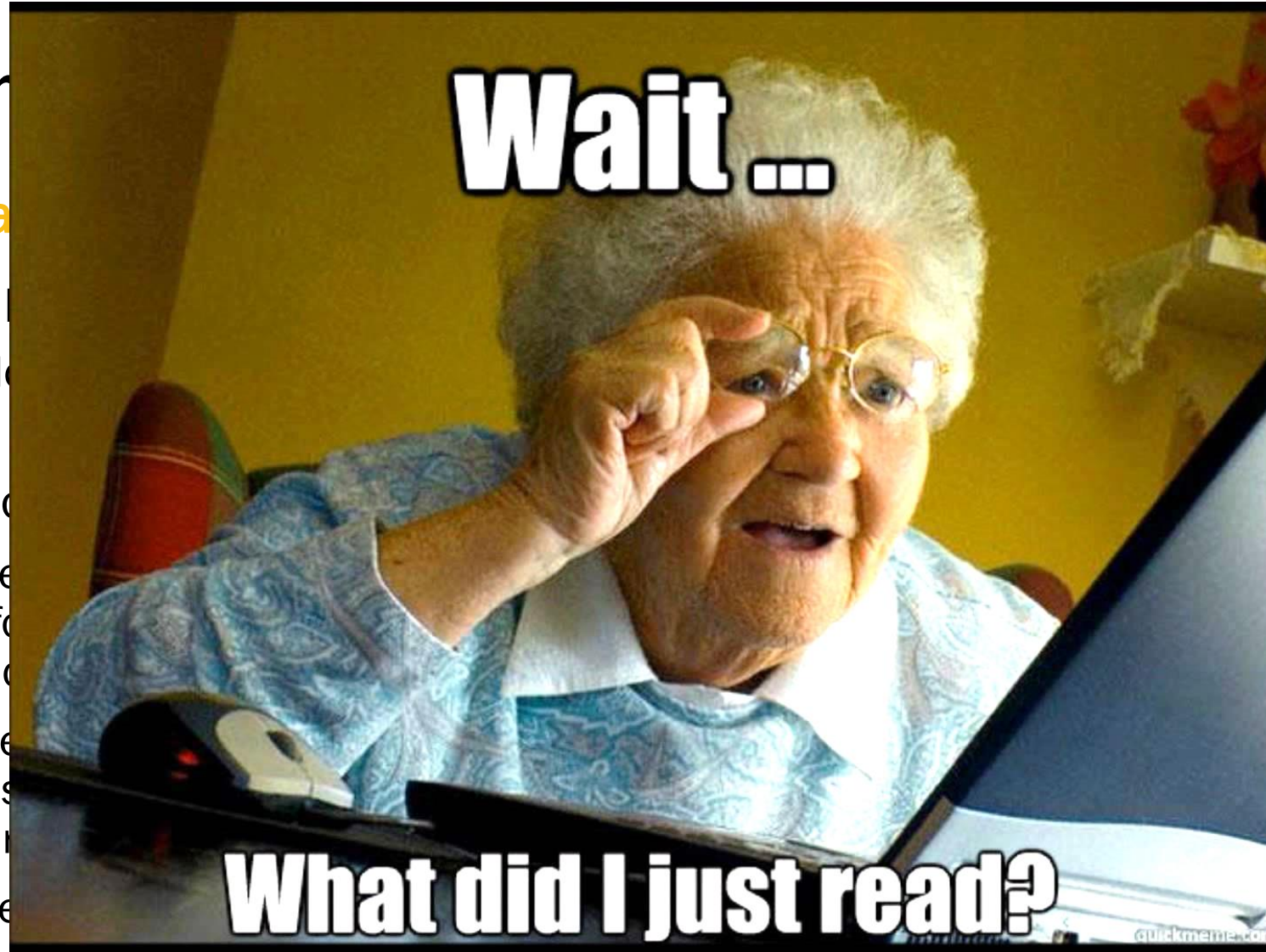
Communication and Persuasiveness

- Meet ONE Mandatory Competency:
 - (M1) Address messages from others through correct interpretation of their messages and an appropriate response
- Have ONE of the three following Desirable Competencies:
 - (D1) Use appropriate interpersonal styles and communication methods to clearly convey information and ideas through a variety of media in a manner that engages the audience and helps them to understand and retain the message
 - (D2) Seek information to understand situations, needs, and desired benefits and develop positioning approaches that leverage supportive factors, overcome/minimize barriers, and address the unique needs and preferences of key decision makers
 - (D3) Interact with prospects/clients in a manner that builds effective relationships

Assessing

Communication

- Meet ONE (M1) Add an
- Have ONE (D1) Use info aud
- (D2) See pos bar
- (D3) Inte



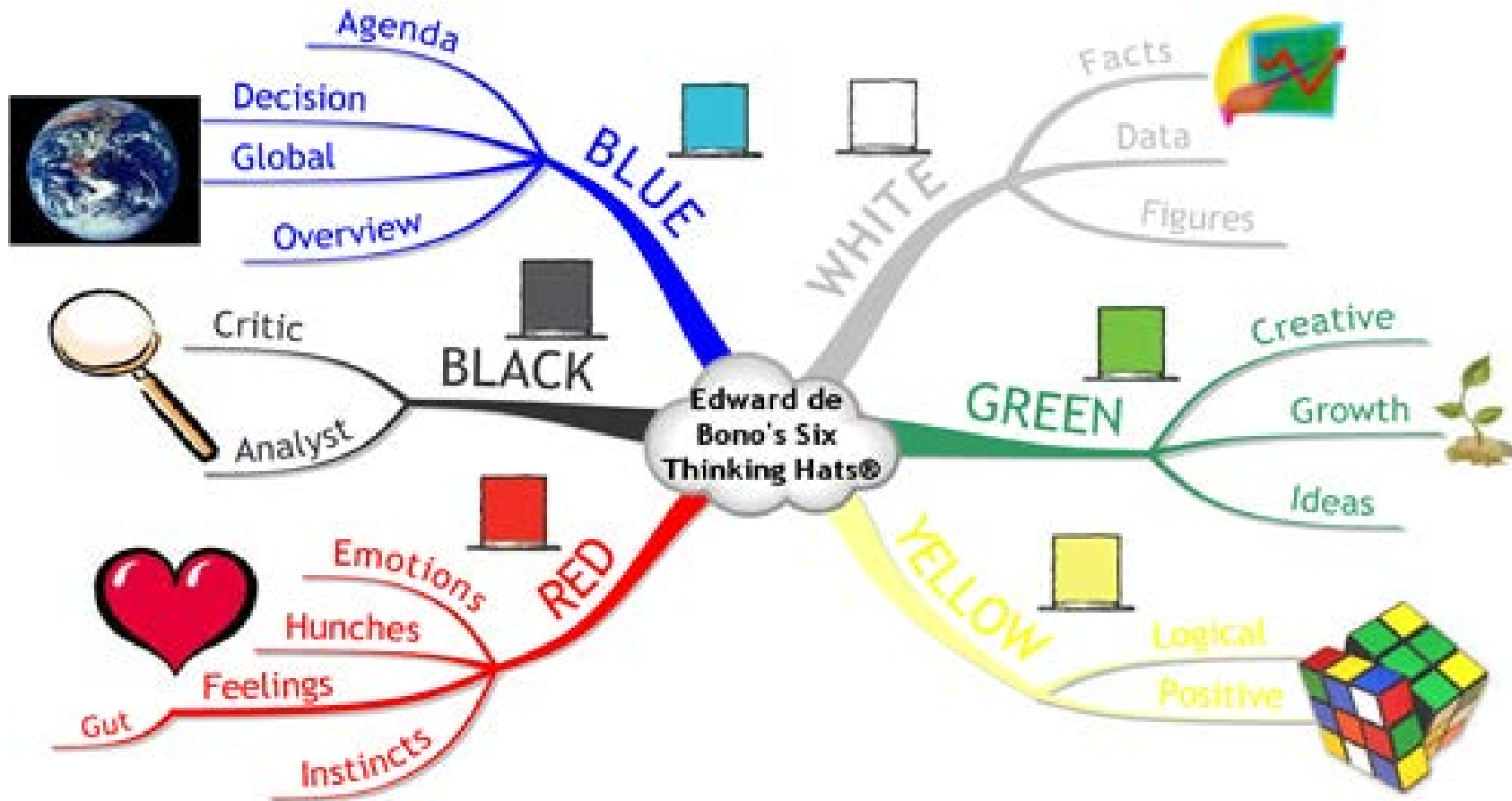
messages and

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minimize
on makers

onships

Think of it this way...



- Know your audience
- Adjust your approach and style
- Build effective relationships and trust

Communicate Clearly: Emails

- Convey the right info in your Subject Line
- Don't 'recycle' with all the “*RE: FWD: RE: blah blah*” when the subject changes
- Specify the **!** importance
- Set a time frame [due date] to react
- Use 'Return Read Receipt'

Examples:

ACTION NEEDED: Your Responses for XYZ Proposal Due Back by 3 p.m. CT, Mon., Oct. 3rd

STATUS UPDATE: Amendment No. 1 Released for XYZ Proposal

TOUCHPOINT CALL: Meeting Agenda Attached for 10 a.m. CT, Tues., Oct. 4th

Assessing your Competencies

Quality Orientation

- Meet ONE Mandatory Competency:
 - (M1) - Accomplish tasks by considering all areas
 - Accurately check processes and tasks
 - Be watchful over a period of time
 - Be prepared to take corrective and preventive action where necessary

THINK QUALITY!

**QUALITY MEANS
ATTENTION
TO DETAIL**

Quality Orientation Tools

Quality Control

Inputs	Tools	Outputs
Quality Management Plan	Quality control processes	Process results
Quality metrics	Quality control checklists	Completed checklists
Quality control audits, sampling, reviews, surveys, and inspections	Performance metrics	Performance reports
Identified deficiencies or errors	Corrective actions	Corrective action plan
Root cause analysis	Preventive Actions	Preventive action plan

Quality Assurance

Inputs	Tools	Outputs
Quality Management Plan	Tailored best practices	Quality processes and standards
Quality metrics and results	Reporting software (Excel or other reports)	Continuous improvements; innovation
Performance results	Variance from plan	Lessons learned

Source: <http://bok.apmp.org/tools-and-templates/> (specifically, [Quality Management Inputs, Tools, and Outputs](#))

Proposal Management Sample: Use a Style Checklist

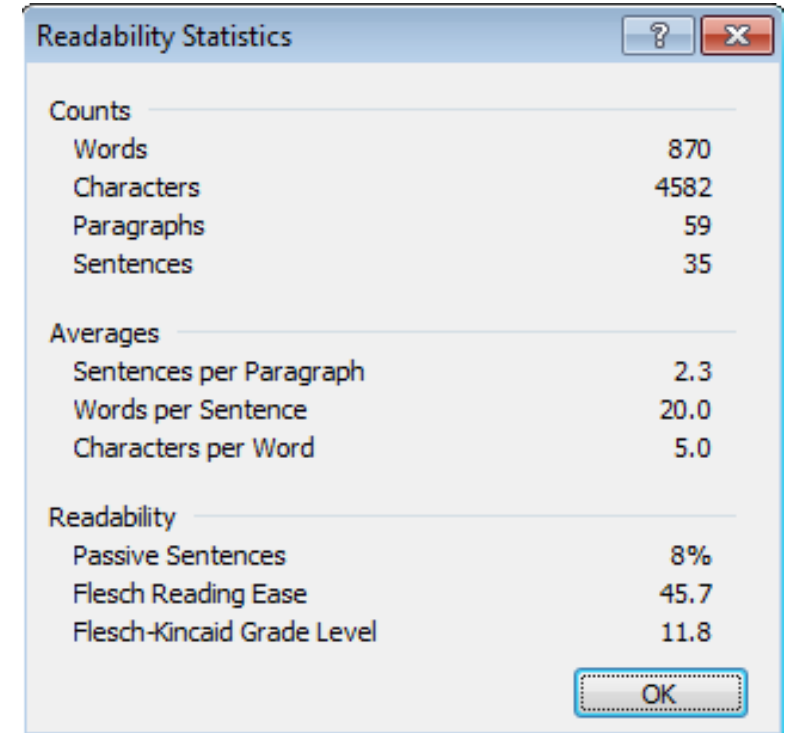
Yes	No	We have:
<input type="checkbox"/>	<input type="checkbox"/>	Used direct address (you/we) to create a customer-focused, persuasive story
<input type="checkbox"/>	<input type="checkbox"/>	Eliminated unnecessary nominalizations
<input type="checkbox"/>	<input type="checkbox"/>	Run a grammar check and spellcheck to find usage problems, unnecessary passive voice, and improper punctuation
<input type="checkbox"/>	<input type="checkbox"/>	Checked all graphic elements for readability, numbering, and captions
<input type="checkbox"/>	<input type="checkbox"/>	Avoided hedges and intensifiers such as: <ul style="list-style-type: none"> • All • Almost • Always • Clearly • Completely • Could • Every • Literally • May • Obviously • Probably • Totally • Usually • Virtually • To a certain extent • It is important to...

Yes	No	We have:
<input type="checkbox"/>	<input type="checkbox"/>	Eliminated redundant pairs and modifiers such as: <ul style="list-style-type: none"> • Full and complete • True and accurate • Each and every • Basic and fundamental • Completely finish • End result • Final outcome • Initial preparation
<input type="checkbox"/>	<input type="checkbox"/>	Eliminated pompous diction and “business-ese”
<input type="checkbox"/>	<input type="checkbox"/>	Eliminated negative phrasings
		We have checked for:
<input type="checkbox"/>	<input type="checkbox"/>	<ul style="list-style-type: none"> • Consistent use of the customer’s name
<input type="checkbox"/>	<input type="checkbox"/>	<ul style="list-style-type: none"> • Consistent use of technical and business terms
<input type="checkbox"/>	<input type="checkbox"/>	<ul style="list-style-type: none"> • Properly defined technical and business terms
<input type="checkbox"/>	<input type="checkbox"/>	<ul style="list-style-type: none"> • Descriptive and grammatically parallel headings
<input type="checkbox"/>	<input type="checkbox"/>	<ul style="list-style-type: none"> • Helpful use of transitions between paragraphs, sections, and volumes
<input type="checkbox"/>	<input type="checkbox"/>	<ul style="list-style-type: none"> • Clear paragraphs with one subject, supportive comments, and a point statement

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

Proposal Management Sample: Turn On Readability

- Turn on your **Readability Statistics** in Word
- Benchmark targets:
 - 14.1 words/sentence (target < 20)
 - 1% passive voice (target < 5%)
 - 49.9 Flesch Reading Ease (target > 40.0)
 - 9.8 Flesch-Kincaid Reading Level (target 9 - 11.9)
- Listen to webinar: [“Improve the Readability of Your Proposals in Four Easy Steps”](#)



Readability Statistics	
Counts	
Words	870
Characters	4582
Paragraphs	59
Sentences	35
Averages	
Sentences per Paragraph	2.3
Words per Sentence	20.0
Characters per Word	5.0
Readability	
Passive Sentences	8%
Flesch Reading Ease	45.7
Flesch-Kincaid Grade Level	11.8

Source: <https://apmp.site-ym.com/store/ViewProduct.aspx?id=7004937> to view Samantha Enslin's recorded session from August 2016. She owns Dragonfly Editorial, an agency that provides writing and editing to customers worldwide. She won the bid to rewrite the APMP BOK.

Assessing your Competencies

Building Strategic Relationships and a Successful Team

- Meet TWO Mandatory Competencies:
 - (M1) Develop and use collaborative relationships to facilitate the accomplishment of work goals
 - (M2) Develop direction and involve others through working collaboratively with the team and regularly sharing important/relevant information
- Have ONE Desirable Competency:
 - (D1) Seek and expand original ideas, enhance others' ideas, and contribute own ideas for the issues



Assessing your Competencies

Decision Making and Delegating Responsibility

- Meet ONE Mandatory Competency:
 - (M1) - Identify and understand issues as well as opportunities
 - Support the resulting decisions
 - Effectively delegate the implementation of the required activities and responsibilities



How will you improve yourself? Others?



Your ideas?

Raise your hand to queue up and we'll unmute your line if you would like to share.



Contact us:

apmpmentors@gmail.com

Thank You!