

Training syllabus

Award-winning
workshops
to help you to
win more



Research shows a direct correlation between an organisation's proposal capabilities and its win rates.

Training is one of the quickest and most cost-effective ways to improve the impact and the effectiveness of your bidding processes.

Our award-winning training is inspired by the work we do helping clients to build better proposal teams, and working sleeves-rolled-up to win for them. Our capture rate when helping clients with their bids is close on 90%. Our course content is also informed by our close ties to the world of procurement, and the extensive research we do gaining insights into how evaluators assess proposals.

Feedback is always outstanding. We bring the perhaps-dull topics of proposal development and pitching to life with passion, leaving participants with practical tips that they can use straight away.



We can help develop all of the following roles in your organisation:



Senior managers



Sales leads, business developers, account and capture managers



Content contributors



Proposal/bid specialists



Writers/editors

We help develop capabilities across all phases of the opportunity lifecycle:



Business development



Pre-proposal planning



Proposal development



Post proposal

Addressing your training needs



Training need 1

Equip your teams with the latest tactics to help them win

Our one-day Winning Proposals Masterclass™ is a great starting point (p4), covering best practices for developing winning documents. From there, we can coach them on the latest techniques for high impact presentations (p5). Specific modules also look at topics such as executive summaries (p10), qualification (p11) and renewal proposals (p7) and will help to sharpen skills in specific key areas.



Training need 2

Ensure subject matter experts contribute the best possible content

As well attending the masterclass and proposal presentation course alongside sales leads (p4 & p5), we offer a more detailed practical writing skills workshop (p15) for technical experts. If they're also managing proposals from time-to-time, then "proposal project management for non-specialists" (p16) would prove invaluable.



Training need 3

Challenge your senior managers to assess your overall proposal and pitch capabilities

You need to understand how the most successful organisations approach proposal development and pitching – and to build a clear plan to improve win rates. Our intensive "proposal excellence" workshop (p19) helps you conduct a frank assessment of your current capabilities, and to identify the benefits of and plans for any necessary improvements.



Training need 4

Help your specialists hone their specialist bid, proposal, campaign and pitch skills

Whether it's sharpening your team's proposal development skills, pitching competencies, or diving into specific areas such as pre-written content, we're passionate about helping individuals to develop their competencies so that they perform more effectively and efficiently. For example, our acclaimed proposal writing bootcamp is one fabulous way to dive into more detail and sharpen writing and editing skills.



Training need 5

Professional certification training for bid & proposal specialists

We're proud of our status as APMP's top-ranked Approved Training Organisation worldwide. It's a testament to our success providing the highest quality training courses and programmes. You can book online for our regular public courses - or contact us to arrange an in-house course for your team.

Note that you must be a member of APMP for the exams on these courses. Your membership fee is not included in the course price.

Support your team by investing in their professional development through APMP certification preparation course and exams. We're proud of our status as APMP's top-ranked Approved Training Organisation worldwide and are therefore well placed to help your teams achieve their certification goals.



Training needs analysis and career development plans

As well as delivering expert training interventions, we can also help you understand the current competency levels of your team versus our expectations and industry averages.

From this understanding, we can build a development path for your teams and individuals. This typically includes a combination of the training courses shown in this document, plus other interventions such as 1:1 coaching and e-learning modules and assessments.

Training need 1

Equip your teams
with the latest
tactics to help
them win



Capturing the deal



Your written proposal is one critical aspect of a winning bid – but how do you plan your overall campaign effectively to capture the deal? We'll equip participants with practical tools to identify strategies and tactics to understand and influence the client throughout the capture process, thus maximising your win probability.

Audience



**Sales leads,
business developers,
account and capture
managers**



**Senior
managers**



**Proposal/bid
specialists**

- Introduction and scene-setting: building an overall plan for the bid
- Understanding the customer and the opportunity - and the client's real drivers and decision-making timeline
- Strategic stakeholder analysis: what do they think now, what do you need them to think, and how can you best influence them
- Assessing the impact of your past and current performance with this client in relation to this contract
- Optimising offer development: who needs to be involved; aligning your technical and commercial solution to the client's real needs
- Understanding the competitive landscape – and the implications for your offer, behaviours, engagement and tactics
- The potential for creative bid collateral – including renewal proposals and pro-active proposals
- Defining your overall story and strategy
- Building an effective influencing plan
- Building, organising and motivating your bid team
- Bid project management: what needs to happen, when, across each key stage of the capture process
- Understanding and managing key risks
- Learning from the event & action planning
- Course wrap up: learnings, take-aways and SP Alumni



Capture tactics



A half-day, highly and practical online course that will help delegates to work out the most appropriate tactics to use to maximise their chances of winning. By sharing examples of proven tactics, we'll offer ideas on how to deliver those tactics, so the desired outcomes are achieved. Templates and tools will also be shared, along with a useful handout, to help delegates to build their own tactics on their current or next deals.

Audience



**Sales leads,
business developers,
account and capture
managers**



**Senior
managers**



**Proposal/bid
specialists**

- Introductions and scene-setting
- Understanding the importance of capture tactics in the sales process
- Identifying gaps in information and what influencing activities are required
- Potential client engagement tactics early in the sales cycle
- Potential actions to fill gaps and influence the client
- Incorporating activities in to the capture plan
- Course wrap up: learnings, take-aways and SP Alumni



Renewal proposals

Incumbent suppliers should be in pole position to retain business when their contract comes up for renewal – yet too many sit back and wait for an RFP to arrive. We'll explore a best practice, proactive approach to retaining business – including, where appropriate, the use of renewal proposals to avoid competitive tendering.



Audience



**Sales leads,
business developers,
account and capture
managers**



**Senior
managers**



**Proposal/bid
specialists**

- Introductions and scene-setting
- The benefit of renewal proposals: building upon in-life contract management; knowing your customer – and the competition – to avoid a competitive rebid wherever possible, or at the least to wire that in your favour
- When and how to engage, and who should be involved
- The ten stage process – the information you need, and the questions to ask:
 - Pre-work – the information required, and how to use it
 - The customer and the buying centre
 - The current contract (what it includes, and our performance)
 - Customer pain points/motivators
 - The opportunity scope (same as existing? more than existing?)
 - Objectives for the renewal (customer and us)
 - Competitor and capability analysis
 - Strategy to win, and grow, the contract
 - Engagement/capture plan to influence the buying centre
 - Message strategy: the proactive proposal, executive document, and renewal presentations
- What to do if you can't avoid a rebid: tactics for influencing the customer's requirements, decision-making and RFP
- Afternoon case study: attendees break into teams for a roleplay to practise the ten steps, presenting their plan and being scored on their proposed approach
- Personal planning: the potential to apply the approach to participants' own accounts
- Course wrap up: learnings, take-aways and SP Alumni



Winning Proposals Masterclass™



An award-winning, high-impact overview of contemporary proposal best practice – equipping participants with practical techniques that will enable them to:

- Improve proposal quality
- Increase win rates.

Audience



**Sales leads,
business developers,
account and capture
managers**



**Content
contributors**



**Senior
managers**



**Proposal/bid
specialists**



**Writers/
editors**

Part 1: Winning proposal output

- Introductions and scene-setting: characteristics of a first-class proposal, and the role of the proposal within an effective sales and bid process
- Interactive case study, driving discussion of top tips for writing persuasive proposal content
- A constructive critique of a sample of your real-life proposal content
- The importance of effective proposal layout and design

Part 2: A repeatable, winning proposal process

- Qualification and pre-proposal planning: chasing the right deals and becoming less reactive in the proposal process
- Strategy development: the role of storytelling in the proposal, and the "three C" process for identifying win themes
- Content design and storyboarding – how to plan your answers to maximise scores in the evaluation
- Proposal structure, including the role and content of an effective executive summary and solution overview
- A final case study, critiquing of your real-life proposal content
- High-impact reviews of your draft proposal ('red teams')

Part 3: Conclusions and next steps

- Course wrap up: learnings, take-aways and SP Alumni



Executive summary masterclass



The executive summary is a critical section in most proposals. This acclaimed, focused course ensures that all participants clearly understand the role of the executive summary, and the process for developing it efficiently and effectively.

Audience



**Sales leads,
business developers,
account and capture
managers**



**Senior
managers**



**Proposal/bid
specialists**



**Writers/
editors**

- Introductions and scene-setting
- Case study 1: "The Grand Hotel" – a generic case study, designed to illustrate key principles
- Goals of the executive summary
- Structure of a compelling executive summary
- Case study 2: reviewing one of your real life executive summaries
- Process for developing the executive summary, including a discussion of key techniques for proposal strategy development
- Other related sections of the proposal: covering letter / foreword, solution overview, conclusions
- Essential tests for a winning executive summary
- Case study 3: reviewing a further real life example
- Course wrap up: learnings, take-aways and SP Alumni



High-impact proposal reviews



A strong and insightful peer review of a draft proposal is proven to significantly improve evaluation scores. Yet experience shows that these 'red team' reviews have less impact than they should unless all reviewers have been trained in what good proposals actually look like, and can review and give feedback effectively. This highly-acclaimed session will therefore ensure that those involved in reviews add the greatest value, using an efficient process.

Audience



**Sales leads,
business developers,
account and capture
managers**



**Content
contributors**



**Senior
managers**



**Proposal/bid
specialists**

- Introductions and scene-setting
- Key principles of effective proposal content and structure, using a case study
- The goals and benefits of a successful peer review (sometimes known as 'red team')
- Who needs to be on the review team? What information do they need to carry out their role effectively?
- Styles of review, and associated techniques
- Case study carrying out a high level review of real life content
- Managing the review process effectively
- Techniques for offering constructive feedback
- Other key reviews in the proposal process, to capture senior managers' creativity and their buy-in for key principles, early in the bid
- Course wrap up: learnings, take-aways and SP Alumni



Presenting to win



A unique and very interactive course that's nothing like typical 'presenting skills' training. We'll coach everyone involved in proposal presentations to bring your story to life in a way that clearly differentiates you from your competitors. After this course, you'll never think the same way again about presenting... and will win more business as a result.

Audience



**Sales leads,
business developers,
account and capture
managers**



**Content
contributors**



**Senior
managers**



**Proposal/bid
specialists**

So you've submitted your proposal, and the client's asked you to come in to present. How do you stand out from the crowd, embracing the latest techniques? We'll give fresh perspectives to presenters both experienced and new, exploring:

- The role of the proposal presentation in your overall campaign
- Seeing the pitch from the buyer's perspective and using psychological techniques to maximise engagement
- Why typical PowerPoint-based presentations don't work
- Bringing your strategy and themes to life
- Maximising engagement through structure
- Maintaining attention throughout
- Doing something that hardly anyone does – combining words and visual properly
- Applying 'charismatic techniques' to connect and persuade
- Getting in touch with your inborn presentation skills
- Answering questions effectively

The day includes lots of practical exercises - which are fun and designed to make attendees realise how good they actually are already. There are also plenty of examples of good (and dreadful) practice in everything from product advertising to keynote speeches.



Live deal coaching

Even the best-trained teams sometimes need additional support in the heat of the battle.



Audience



**Sales leads,
business developers,
account and capture
managers**



**Senior
managers**



**Proposal/bid
specialists**



**Writers/
editors**

Live deal coaching support is tailored to the needs of your specific bid, but can include some or all of:

- Refresher training modules on key topics, delivered at the appropriate stages of the proposal effort to ensure that all those involved are 'on the same page', and that team members apply best practice techniques when working on the bid
- Live deal healthchecks: focused reviews of proposal status, checking that the deal is in good shape and generating ideas to improve your win probability
- Workshop facilitation – leading the team through key sessions such as proposal strategy development and storyboarding, in line with the best practices previously covered in the classroom
- Peer review support – critiquing your content through expert eyes, helping you to maximise your scores in the customer's evaluation
- Management of, and/or constructively critical participation in, pitch rehearsals
- Course wrap up: learnings, take-aways and SP Alumni

Qualification – beyond “It’s strategic!”



Business development



Pre-proposal planning



Proposal development



Post proposal

Most organisations have a “bid / no bid” process – the best way of ensuring that they maximise their win rates. Yet too often teams still end up chasing deals where they’re not confident of success. This challenging but practical workshop will ensure that all those involved in opportunity qualification know how to spot the winners and take the sometimes difficult decisions as to which deals to pursue.

Audience



**Sales leads,
business developers,
account and capture
managers**



**Senior
managers**



**Proposal/bid
specialists**

- Introductions and scene-setting; the benefits of effective qualification
- Generic case study, to stimulate debate and introduce key principles
- The four question mantra for effective qualification
- When is a deal truly ‘strategic’?
- Practicalities. Who should be involved in the qualification discussion? When should it take place?
- Case study based on a real life scenario for your business
- The link to (and value of) effective pre-proposal planning
- Handling the “no bid” discussion to enhance your client relationship, and potentially to create a fall-back option
- Course wrap up: learnings, take-aways and SP Alumni

**HALF
DAY**

Training need 2

Ensuring subject
matter experts
contribute the
best content



Proposal project management for non-specialists



It's critical that you manage proposal projects efficiently and effectively. Some proposals are managed by professional bid / proposal managers. Others are co-ordinated by sales or solution experts, and this course walks them through the necessary proposal project management techniques.

Audience



**Sales leads,
business developers,
account and capture
managers**



**Content
contributors**

- Introductions and scene setting
- Key activities within the proposal process
- Building an end-to-end proposal project plan: what needs to happen when?
- Identifying and engaging the right participants, and defining roles and responsibilities
- The kick-off workshop: purpose, participants, timing, agenda
- Identifying and managing proposal project risks
- Monitoring project progress
- Building in time for reviews and governance
- Course wrap up: learnings, take-aways and SP Alumni



Bid director excellence



The ultimate training course for leaders of major pursuits. Gain the essential tools and concepts to effectively lead large teams, foster collaboration, and efficiently secure wins. From forming dynamic teams to crafting winning strategies, this course will equip you with the skills needed to navigate the process, create compelling content, and conduct effective reviews. Take charge of your pursuits and achieve unparalleled success.

Audience



Senior managers



**Sales leads,
business developers,
account and capture
managers**

Levels of proposal maturity

- Introductions and scene-setting
- Forming and leading effective teams
 - Leadership
 - Collaboration
 - Team commitment & roles
- Developing a win strategy
 - Responding to client needs
 - Win strategies
 - Price to win
- Developing / delivering a successful bid
 - Understanding the process
 - What good content looks like
 - Effective reviews
- Course wrap up: learnings, take-aways and SP Alumni



Strategic content development



Designed specifically for experts who are contributing to proposals, this course unlocks the power of planning and efficiently developing winning content. Engage in realistic scenarios tailored to your industry, putting your newfound knowledge to the test, while leveraging real-life samples to enhance your understanding of best practice. This highly practical course equips you with the tools and approaches needed to excel in crafting compelling and persuasive proposal content, driving your organisation towards success.

Audience



**Sales leads,
business developers,
account and capture
managers**



**Content
contributors**

- Introductions and scene-setting
- What does winning content look like?
- Introducing the scenario
- Winning ingredients
- Planning your content
- Writing to win - our top tips
- Developing winning responses
- Reviewing your content versus the real response
- Course wrap up: learnings, take-aways and SP Alumni



Training need 3

Challenge your senior executives to assess your overall proposal and pitch capabilities



Proposal best practices for senior managers

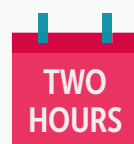


It's essential that your most senior managers understand the skills that staff are learning on the training we're delivering. Yet they often can't spare the time to attend a full day course. This intensive executive briefing provides them with a strategic overview of the best practices covered on our 'Winning proposals masterclass'.

Audience



- A high-level overview of the core areas necessary for successful proposals, as covered in the Masterclass course and reflecting participants' comments and feedback during the training. Topics include:
 - The role of the proposal in the sales and bid process
 - Qualification: being more ruthless in 'bid / no bid' decisions
 - The value of pre-proposal planning and renewal proposals
 - Proposal strategy: developing and testing a compelling story
 - Content design and storyboarding to maximize evaluation scores
 - "What good looks like" – effective proposal writing and design
 - The peer review process, and techniques for giving feedback
- The strategic value of an effective approach to proposal management
- Course wrap up: learnings, take-aways and SP Alumni



Proposal excellence

An intensive half day workshop, allowing senior managers to benchmark your current proposal capabilities against key areas of proposal best practice - and hence to identify improvement opportunities and the potential benefits of sharpening your approach to proposals.



Audience



Part 1: Levels of proposal maturity

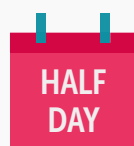
- Introductions and scene-setting
- Current performance: quality and success rates – how do you fare?

Part 2: Benchmarking

- Efficient, effective processes: how does your approach stack up against best practice, in ten key areas? What are the improvement opportunities?
- Building proposal teams: how do you engage the right staff to work on each proposal, ensuring they have the necessary skills and bandwidth?
- A high-performing proposal function: optimising the role of the effective proposal centre; engagement model, capacity and key performance indicators
- Proposal resources – including pre-written proposal content: effectively managed, or incomplete and outdated?
- Proposal design & production: contemporary or “very 2012”?
- Proposal output: how do your submissions compare to contemporary best practice?

Part 3: Action planning

- Creating the right culture to gain competitive advantage from enhanced proposal capabilities
- Modelling the potential benefits of an improved approach
- Next steps: an outline improvement plan
- Course wrap up: learnings, take-aways and SP Alumni



Training need 4

Help your specialists
hone their specialist
bid, proposal,
campaign and
pitch skills



Capture planning masterclass



A face-to-face or online immersive two-day course that helps your teams put capture theory to the test using a realistic scenario developed specifically for your organisation.

Audience



**Sales leads,
business developers,
account and capture
managers**



**Senior
managers**

- The importance of capture
- Introducing the scenario
- Qualifying the opportunity
- Creating your win strategy
- Identifying capture tactics
- Building your capture plan
- Developing your win themes
- Planning for key client meetings
- Delivering your winning message
- And the winner is... awards
- Course wrap up: learnings, take-aways and SP Alumni

Detailed handouts will be provided as well as a pack to help participants, who want to go on and take the Capture Practitioner exam, to study and prepare.

**TWO
DAYS**

Face-to-face

**4 x
HALF
DAYS**

Virtual sessions

Winning Proposals Masterclass™ for bid and proposal specialists



Pre-proposal planning



Proposal development

This intensive course will equip your bid and proposal staff with the skills needed to lead proposal teams professionally, ensuring that they apply a consistent and insightful approach to proposal development. As a result, you will improve proposal quality, increase win rates and manage proposal projects more efficiently and effectively.

Audience



Proposal/bid specialists

Part 1: Winning proposal output

- Characteristics of a first-class proposal; the role of the proposal within the sales cycle
- Proposal writing: top tips for persuasive content
- Proposal layout and design (key principles)

Part 2: Implementing a winning proposal process

- Overview of the strategic proposal lifecycle
- Exploration of key process steps that impact win rate:
 - Qualification and pre-proposal planning
 - Strategy development – identifying your story and win themes
 - Content design / storyboarding techniques – including an exercise on handling non-compliance
 - Peer reviews (red team) and approvals
 - Learning reviews
- Managing & leading the team - including kick off meetings, risk management and effective team communications

Part 3: Proposal structure & key sections

- Covering letter / foreword; executive summary; solution overview; conclusions section

Part 4: Conclusions and next steps

- Levels of proposal maturity; the role and value of the effective proposal management function
- Auditing the quality of your proposals
- Course wrap up: learnings, take-aways and SP Alumni

There'll be case study work throughout, using generic examples to introduce key principles, plus extracts from your real-life proposal content.



Effective proposal writing



Clear, impactful proposal writing is a critical skill for proposal writers, proposal managers and others in your proposal centre. And, with AI starting make inroads in this area, it's vital that people are equipped to take base content and transform it into something compelling.

This unique course (which is grounded in buyer psychology) will ramp up the quality and persuasiveness of your proposals and give your team members more confidence.

Audience



**Sales leads,
business developers,
account and capture
managers**



**Content
contributors**



**Proposal/bid
specialists**

Using numerous practical exercises and real-life examples, we'll explore:

- The psychology of proposal writing – and proposal evaluation
- Fundamentals of writing persuasive proposal content including:
 - Writing concisely
 - Creating a professional, personal and energetic tone
 - Maintaining interest and engagement
 - Putting the client at the centre of your writing
 - Tailoring pre-written content
 - Avoiding the pitfalls – such as inadvertent risk and 'pink elephants'
 - Using evidence effectively
 - Writing for 'skimmers' – understanding how people absorb information and catering for this
 - Storytelling – getting the structure right in everything from individual answers to case studies
- Persuasion – using 'charismatic techniques' to increase the impact of your writing
- Punctuation and grammar refresh - covering everything from the difference between 'which' and 'that' to nominalisations and dangling modifiers
- Thinking visually – why writers need to think about design too
- Collaborating effectively with technical subject matter experts
- Interviewing and questioning techniques
- Overcoming common barriers such as 'I don't have time'

There is an optional writing exercise, completed after the course. Participants then get personalised feedback.



Proposal design masterclass



“People see what it looks like before they read what it says”. The quality of proposal design has increased radically in recent years. This interactive session will explore the importance of good design, with practical tips to enable you to produce proposal output that matches contemporary good practice.

Audience



- Introductions & scene-setting
- Why design matters in proposals
- Practical exercise: ‘Magazines’, looking at what works well and what doesn’t in design
- Step by step exploration of best practice proposal design techniques for key areas of the document, including:
 - Forewords
 - Front covers
 - Section dividers
 - Page layouts
 - Graphics
 - Back covers
 - Other bid collateral
- Course wrap up: learnings, take-aways and SP Alumni



Document management essentials



An expert view of the very best ways to build your proposal documentation in Microsoft Word. This highly practical workshop ensures that all participants come away with hints and tips on how to manage the collation of proposal content from contributors, and produce a high-quality final document.

Audience



Especially suitable for staff who create, collate, format and publish proposal documents using Microsoft Word

Part 1

- Introductions & scene-setting
- The importance of document management
- Document design – the how, what and why
- Document creation – putting the right foot forwards
- Content management
- Collaborative creation
- Visual design
- Document management tools
- Document management best practice
- Finalising your document

Part 2

- The document template
- Page design
- Styles, themes and tables of contents
- Objects - images, covers, dividers and tables
- Proofing, editing and locking
- Reviewing
- Macros and developer functions
- Course wrap up: learnings, take-aways and SP Alumni



Can be split into two half-day workshops

Managing pre-written content



A high-quality library of pre-written proposal content is key to developing first-class proposals efficiently – saving considerable time (and cost), and improving proposal quality. This practical workshop builds a shared view of how content should be managed effectively. It's particularly useful where your current content knowledge base is tired and needs refreshing, or where you're embarking on building a new library of content.

Audience



Proposal/bid specialists

(responsible for managing the pre-written content process)



Content contributors

(who own content which might usefully appear in your knowledge base – technical staff, marketing / product management, legal etc.)

- Introductions and scene-setting
- Pre-written content: the benefits of a strong knowledge base
- Key principles of effective proposal content
- "Cut and paste" – or "cut and paste and tailor": designing pre-written content that is easy to adapt. (Group exercise)
- Identifying target content for your library
- Building a new or refreshed pre-written content library: key activities and project plan considerations
- Keeping content updated:
 - Roles and responsibilities: ownership, articulation and publication
 - Closed loop feedback – from library usage and live deals
 - An effective content management process
 - Measuring effectiveness
- Case study: a review of a current sample of pre-written content.
- Graphics and design templates within the knowledge base.
- The role of the pre-written proposal for key propositions and pro-active proposals
- Tools for managing pre-written content effectively
- Practical discussion: next steps to build / enhance your content library
- Course wrap up: learnings, take-aways and SP Alumni



Coaching your proposal specialists



1:1 coaching is an essential part of the training mix, helping to focus and support your team as they improve their individual capabilities

Audience



We'll agree the most appropriate coaching approach with you, for each of your team. Typically, we'd schedule a sequence of at least four one-hour sessions per individual, over the course of a year. During these, we'd cover:

- A critique of recent proposal output, using our benchmarking model, enabling participants to understand what's working well – and how they could sharpen their next document
- Review of typical challenges being faced by the individual concerned, on specific bids or improvement projects, leading to practical advice and suggestions

Coaching may also provide your overall head of bid / proposal management with a trusted sounding board, helping them to:

- Shape the direction of the proposal support function
- plan and develop ideas for specific improvement projects
- respond to any recent developments or current demands



Leading winning proposal teams



To manage the development of a winning proposal, the proposal manager needs to demonstrate a range of leadership skills in order to build trust, rapport and confidence within the bid team. This workshop starts with the team developing a proposal from start to finish – picking up typical issues and ensuring that these are explored in a safe environment, with the aim of improving performance.

Audience



- Introductions & scene-setting
- “The Proposal Game”:
 - Group exercise, developing a proposal in ‘fast forward’
 - Review and learning
 - The ‘game’ versus the reality: discussion
- Leadership versus management
- Leadership at key proposal project stages:
 - Planning the proposal project
 - Lining up the right people and ensuring role clarity
 - The role of the executive sponsor
 - A truly effective kick-off workshop
 - Identifying and managing risks to submitting a winning proposal
 - Pre-RFP planning
 - Managing communication with the team effectively
 - How to handle typical proposal project problems
 - What happens after the proposal’s been submitted?
- Leading proposal teams in a online environment
- Summary and close
- Course wrap up: learnings, take-aways and SP Alumni



Coaching the pitch team



Delivering a successful pitch requires careful planning and preparation. We'll cover a structured eight-stage process to enable you to coach your bid team to present successfully and confidently, ensuring that they bring the story you've told in your written proposal to life.

Audience



**Sales leads,
business developers,
account and capture
managers**



**Proposal/bid
specialists**



**Pre-requisite:
attendance at our
"Presenting to Win"
course, to understand
the characteristics
of a high-impact
contemporary pitch**

- Introductions, scene-setting, experiences to date, objectives
- The principles of good presentations: what you need to know, challenges you might face
- Exercise: leading the presentation process – what your team, your management and your customer expect of you
- From proposal to pitch – "continuity, empathy and engagement"
- 'Sowing onto fertile ground' – stakeholder management between submission and presentation
- The eight-stage process:
 - Customer requirements and expectations (internal and external)
 - Build and coach your presentation team
 - Design your presentation content – bringing your proposal to life, and planning for the audience's questions
 - Develop materials – tips for slides, handouts and presenter notes
 - Plan logistics (exercise: 'When and where' / 'future history')
 - Rehearse – ensuring the team practises until it appears natural (with case study)
 - Deliver – checklists of what to do – and observe – and how to coach the team during the presentation
 - Review – learning from the presentation, seeking feedback, and preparing for the next stage.
- Course wrap up: learnings, take-aways and SP Alumni



Presenting to win – advanced



You've been on the core 'Presenting to win' course and have seen the difference it's made. You know what works and you'd like to develop your skills further, giving you even more of an edge. This course does exactly that.

Audience



**Sales leads,
business developers,
account and capture
managers**



**Content
contributors**



**Senior
managers**



**Proposal/bid
specialists**

- Refresher of key topics from 'Presenting to win', and discussion of experiences since: what have participants tried, and what's worked well?
- Winning introductions and closes
- The 'back story': living your value proposition
- The 'big story': designing your strategic messaging
- 'Stories within the story': the power of anecdotes and analogies
- Visual thinking: turning ideas into memorable images
- Bringing it all together: advanced delivery skills
- Course wrap up: learnings, take-aways and SP Alumni

As with the core 'Presenting to win' course, the day will include numerous practical exercises, with the chance to develop skills (and try new things) in a safe and supportive environment.



Bid learning reviews



Business development



Pre-proposal planning



Proposal development



Post proposal

What worked well on your bid and proposal effort – and what could have gone better? Win or lose, an effective process to identify lessons learned is key to bid and proposal success.

It's critical that bid teams reflect on what's worked well, and what could have been improved, on each opportunity. We'll present a structured approach to an area that's often overlooked.

Audience



Bid/proposal specialists



**Sales leads,
business developers,
account and capture
managers**

- Introductions, scene-setting and objectives
- The internal lessons learnt process: barriers to a successful review; who needs to be involved; when reviews need to happen; what needs to be discussed; making them work effectively
- Client debriefs: when these should take place; why they often fail; what needs to be covered; who should lead the review; what should be covered
- Six creative tips for learning – including, for example, the role of client audits and the 'birthday review'
- Conclusions and next steps: what are individuals going to do on their next bids, and what needs to change systemically



Training need 5

Professional
certification training
for bid & proposal
specialists



APMP Capture Practitioner

APMP's Capture Practitioner certification is designed for industry professionals who specialise in capture, business development, opportunity management and pursuit. If you're in sales, business development, or a bid or proposal specialist who gets involved in the early stages of the pursuit, then this is the qualification for them.



Audience



- An overview of the APMP certification programme, and how the Capture Practitioner exam works
- Opportunity/capture plan development and scheduling – developing and maintaining a plan that is structured, dynamic and agreed across your business
- Team selection and management – how to ensure you have the right team aligned, senior leadership engagement and buy-in and clear objectives for all involved
- Strategy and tactics – reviewing topics such as customer's buying cycles, value propositions, teaming, handling objections and winning strategies
- Reviews and gate decision management – how to smoothly navigate and lead decision-makers and contributors through multiple gate decisions and reviews
- Pricing to win – customer and competitor analysis and the fine balance of value v cost
- Presentation and persuasive communications – preparing and presenting compelling content and presentations that positively persuade your audience
- Negotiation – techniques for generating a successful win-win outcome
- Self-leadership, leading others and stakeholder management – we'll cover communication skills including leadership, delegation, teamwork and conflict management

Minimum of
5 attendees for
exclusive
in-house
course



Delivered over four online 3-hour sessions
or two 1-day sessions



Proud winners of
APMP Supplier of
the Year 2022

APMP Foundation workshop

An intensive course that prepares candidates to sit and pass the Association of Proposal Management Professionals' Foundation examination (which is taken at the end of the day). This enables bid / proposal specialists to attain a recognised qualification in their professional discipline, whilst providing fresh perspectives to sharpen their approach to the proposal process.



Audience



We've helped over 2,500 candidates worldwide to pass APMP Foundation since 2007, and have an unparalleled pass rate.

Pre-work

- Prior to the course, candidates will need to read through APMP's Study Guide. (We'll provide revision notes and practice exam questions to help them).

Content

- An overview of the APMP certification scheme
- Explanation of the exam process
- See course material examples later in this document.
- Detailed review of the topics within each of the five key competency areas in the APMP Foundation Level syllabus

Exam

- Candidates will be provided with a code which enables them to take the exam after the course in their own time
- We'll support any queries that attendees have on the exam process after the course
- Attendees taking the exam will be informed of the results after completing the exam

Minimum of
5 attendees for
exclusive
in-house
course



Our online version of this course is delivered as 2 x 3 hour online sessions and the candidate is registered for the exam, to take in their own time after the course.



Proud winners of
APMP Supplier of
the Year 2022

APMP Practitioner workshop & coaching

APMP Practitioner is the second tier on the professional certification ladder for specialists in bid and proposal management. A new exam-based version of the Practitioner qualification was introduced in summer 2019. This course will guide you through the exam process.



Audience



Proposal/bid specialists



Sales leads,
business developers,
account and capture
managers

The new version of APMP's Practitioner qualification uses an online, 2.5-hour Objective Testing Exam to assess whether candidates can apply best practice to a series of complex questions about a given scenario.

This course will help you to understand:

- How the exam is structured
- how best to prepare for the exam (including sharing and discussing how to answer actual questions)
- the different styles of questions you'll see on the exam paper
- what to expect on the day you sit the exam.

Attendees will then sit the exam in their own time after attending the course. We'll brief them on how to do this and guide them on exam approach and strategy.



Delivered as a 3.5 hour
online workshop



Proud winners of
APMP Supplier of
the Year 2022



APMP writing certification preparation course

An online, two-session course takes delegates through each of the topics covered within the APMP writing micro-certification. Using examples to bring the course content to life, attendees will be provided with the knowledge required to successfully navigate the exam. A detailed handout is also provided to support pre-exam preparing.



Audience



writers/
editors/
reviewers



Subject matter
experts



Senior
managers

Our APMP writing certification course will lead you through the exam syllabus, maximising your chance of passing.

Content

- Customer focus
- Persuasion
- Writing clearly
- Review management
- Compliance & responsiveness
- Features, benefits and discriminators
- Unseating the incumbent
- Proof points
- Hot buttons
- Content plans & designs
- Headers
- Actions captions, graphics and multimedia
- Presentations
- Value propositions
- Interviewing SMEs
- Q&A proposals
- Proposal libraries
- Themes statements
- Resumes
- Proactive proposals

Plus:

- Planning to prepare for the exam
- Wrap up and learnings

Exam

- Candidates will be provided with a code which enables them to take the exam after the course in their own time
- We'll support any queries that attendees have on the exam process after the course
- Attendees taking the exam will be informed of the results after completing the exam



Delivered as either 2 x 3-hour online sessions
or full day face-to-face course



Proud winners of
APMP Supplier of
the Year 2022



Online training

Refresh or learn key proposal skills with our low-cost suite of online training videos!

Proposal Essentials

Our award-winning proposal training is now available in a series of entertaining and informative videos!



Business development



Pre-proposal planning



Proposal development



Post proposal

Audience



**Sales leads,
business developers,
account and capture
managers**



**Content
contributors**



**Senior
managers**



**Proposal/bid
specialists**

Our 'Proposal Essentials' online training programme is presented by our UK managing director, Jon Williams. They provide a high-impact and cost-effective way of learning new techniques – or as a refresher to let you step back from the heat of the proposal battle and remind yourself of best practice.

Modules each last between 8 and 18 minutes, covering:

- Introduction – the role of the proposal in a winning sales cycle
- Qualification – how to make sure you're chasing the right bids
- Pre-proposal planning – planning for success before an RFP
- Planning and management – organising your proposal team
- Proposal strategy – building a compelling story
- Content design – storyboarding to maximise evaluation scores
- Content development – for persuasive and professional content
- Proposal design – design tips to make your proposals look great
- Reviews and approvals – sharpening content, late in the process
- Learning reviews – what went well and how to improve
- A strategic approach – to drive real win rate improvements

You'll also get a free PDF copy of our bestselling book, 'Proposal Essentials'.

Pricing for the whole online training package starts from £40 + VAT for members of the Strategic Proposals alumni.



For more details:

strategicproposals.com/our-services/proposal-essentials

Making your training budget go further

Training & coaching packages



If you're looking to organise a structured training and coaching programme, running over several months, we'll be able to configure the right plan for you. In turn, booking in multiple courses will enable us to offer you significant discounts from our standard rates.

You might want to use our free-to-use tools:



Proposal Benchmarker™ to assess your organisation's ability to win by taking our self-assessment, including recommendations on where to improve.



My Proposal Coach™ to assess your current competence in the role that you perform today, with ideas on how you could refine and develop your skills.

We'd love to chat about your specific training needs – and to help your bid teams to succeed.

Strategic Proposals alumni

Keeping you in touch with best practice

Everyone who's attended one of our courses is eligible for free membership of the SP Alumni. This offers you a range of benefits including:

- Access to proposal insight and knowledge – via regular research reports, e-newsletters, our blog and an annual alumni survey
- Regular opportunities to grow your network – with membership of our closed user group on LinkedIn and priority invitations to Strategic Proposal events
- Regular prize draws - for example, to win free tickets to industry conferences.



Sign up free at strategicproposals.com/alumni





We chose Strategic Proposals due to their wealth of experience and evident expertise. They did what every company should do when preparing – listened to our requirements, demonstrated they understood them and tailored the training material to meet our needs. The course content was exactly what we wanted. The use of real-life case studies was one of the highlights and made the training relatable to all attendees. The full team walked away from the course with valuable guidance for how to improve their sales proposals.

Head of Bids, Professional Services



Sales proposals: key to winning business.

It's essential that all those involved in proposal development – salespeople, content contributors, senior managers and bid / proposal specialists – have the necessary skills.

And our award-winning courses are proven to help teams to win more and win more easily.

For more information,

please email info@strategicproposals.com or telephone us on 0800 009 6800

Try our free-to-use tools:



**Strategic
Proposals**



0800 009 6800



info@strategicproposals.com



strategicproposals.com



[Strategic Proposals](https://www.linkedin.com/company/strategicproposals)