Training syllabus 2016/17

Award-winning workshops to help you to win more and win more easily

Strategic Proposals
Proposals – key to success

Written proposals are critical to winning business – done well, a true source of competitive advantage in your sales process. So if you’re serious about successful bidding, you need all those involved to have the skills necessary to help you win.

Proposal development is an acquired skill – it’s not in our DNA and we’re not taught it at college. People learn on the job, often accumulating bad habits as they go; it’s rare they stand back and consider how proposals should really be done. And it’s an area not covered effectively in most general sales training programmes.

Our award-winning courses will equip and inspire your team to write winning proposals more effectively and efficiently – and then to convert the written word into a compelling pitch. Pragmatic in their design and delivery, they’re focused and intensive, with most courses lasting at most one day. They’ll increase your win rates and drive down the cost and time needed to bid. We offer events focused on the needs of the business as a whole – including salespeople, content contributors and senior managers – as well as training for your bid and proposal specialists (such as bid managers, proposal managers, writers and designers).

Our trainers and coaches are amongst the most senior proposal professionals in the world, renowned for their expertise and passion – able to get even the most jaded of audiences actually excited by the prospect of writing their next proposal better!

The courses we deliver are in line with the latest best practice - drawing on extensive research with buyers and successful bidders, as well as our own track record on live bids (with an 89% capture rate in the past two years). To ensure relevance, every event uses real-life case study material developed from your own processes and recent proposals.

And our training has been proven over nearly thirty years to gain outstanding feedback and to deliver immediate, tangible results.
Business proposal skills

All those involved in proposal development need to have the necessary skills.

This section outlines the workshops we run to equip your teams to win more and win more easily.

They include:

- our award-winning one-day Masterclass
- an acclaimed course on proposal presentations
- a one-day course to embed best practice
- half-day modules on critical topics
- behind the scenes insights into the procurement function
- a one-day senior workshop to build a blueprint for improved proposal operations.
Business proposal skills framework
The necessary proposal skills for sales leads, content contributors and senior managers

Core content

- Winning proposals masterclass
- Presenting to win
- Book – ‘Proposal Essentials’

Building winning capability

The buying framework
- Understanding the buyer

The bidding framework
- Capturing the deal
- Renewal proposals
- Proposal project management for non-specialists

Advanced skills
- Practical writing skills workshop
- Proposal best practices for senior executives
- Presenting to win - advanced

Process excellence
- Executive summary masterclass
- Qualification – beyond “its strategic!”
- High-impact proposal reviews

Embedding best practice

- Proposal excellence in a day
- Winning your next proposal - workshop
- Live deal coaching
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.

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
- Handling non-compliance ("Blue paper" – a group exercise).
- 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

- Learning from the event – including practical exercise ("Proposal playing cards") and personal action planning
- Course feedback
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.

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
- Bringing your strategy and themes to life in the presentation
- Maximising impact through structure
- Using your natural talent to get the words right
- Doing something that hardly anyone else does – combining words and visuals properly
- Getting in touch with your inborn presentation skills (and it’s easier than you think)
- Learning, action planning and feedback

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.
Proposal Essentials

The quickest way to share best practice with your proposal contributors.

Written in a highly engaging style by the principal directors of Strategic Proposals, Jon Williams and BJ Lownie.

128 pages covering the ten key stages of the proposal process, with numerous real-life examples.

Available from Amazon, or direct from Strategic Proposals at discounted rates for orders of 20+ copies.

I’m on my fourth copy of the book! Why? It lives in my laptop bag, and whenever I lend it to anyone, it’s gone forever. The easiest to read and absorb proposal book you could hope to come across: common sense on each page.”

“If you only ever buy one book about proposal management, make it this one!”
This course – presented by a senior procurement expert – provides a behind the scenes view into the world of the buyer. Exploring the processes and tactics most commonly used by purchasers, the event enables attendees to be more effective when seeking to understand or influence customers’ buying teams.

- Introductions and scene-setting
- Experiences of procurement: opening perspectives from participants
- Purchasing maturity – traditional / tactical / strategic. What are we dealing with? Who’s really making the decisions?
- The strategic procurement lifecycle - and how to align your sales process for best effect
- Strategic procurement tools – including category positioning, customer segmentation and cost analysis
- Negotiation styles & behaviours – getting beyond the process
- Procurement views of sales proposals: “The Buyers’ Guide to Bidding”
- Learning from the event and action planning
- Course feedback
Negotiating with procurement

This course empowers anyone involved in client negotiations to negotiate more effectively. It helps teams to better understand negotiation objectives, processes and strategies – driving a deeper understanding of what the customer values and how they’re likely to behave during negotiations. By the end of the course, attendees will be able to negotiate more effectively and confidently, closing better deals.

Morning: Negotiation
- Negotiation in theory, and in your world
- The negotiation process
- The negotiation zone – anchoring, trading and the psychology of negotiation
- Negotiation strategies – the emotional and physical gameplays to achieve your desired outcome
- Preparing for negotiation – understanding procurement, wish lists, concession lists, roles and responsibilities, objectives
- Negotiation – face to face and remote
- Signals – what they are and how to act upon them
- Packaging up the deal – what’s included, and how much?
- Closing the deal, and ensuring it’s what you agreed

Afternoon: Case play
- A case play based upon a typical negotiation for your business.
- Attendees will be split into two teams – buyer and seller. Each will be coached by one of our experts and encouraged to practise different techniques to understand their impact and effectiveness, and to familiarise themselves with the process
- They will then prepare for and negotiate the deal, rotating roles to gain maximum experience in a safe environment
- The afternoon will conclude with a debrief, learning from the event, action planning and feedback
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.

- 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 we need them to think, and how can we best influence them
- Assessing the impact of our past and current performance with this client in relation to this contract
- Optimising offer development: who needs to be involved; aligning our technical and commercial solution aligns to the client’s real needs
- Understanding the competitive landscape – and the implications for our offer, behaviours, engagement and tactics
- The potential for creative bid collateral – including renewal proposals and pro-active proposals
- Defining our overall story and strategy
- Building an effective influencing plan
- Building, organisising and motivating our 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 feedback
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.

- The benefit of renewal proposals: building upon in-life contract management; knowing your customer – and the competition – to avoid the RFP
- 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
- Securing the renewal – knowing when you’ve won
- What to do if you can’t succeed – how to influence or write the 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
- Learning from the event, action planning and course feedback

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**Audience**

- Sales leads
- Senior managers
- Bid / proposal specialists

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**Business**

- Bidding framework
- 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.

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**Audience**

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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.

- 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
- Learning, action planning and feedback
Thanks, great course, I really enjoyed it.

**Really enjoyable**

I found the whole course energising and worthwhile. The snippets of new ways to do things are particularly helpful and easy to implement. I think it’s a great benchmark for all proposal staff to have attended this course.

**Engaging, relevant and well delivered**

**Very enjoyable – lots that will be put into practice**

**Excellent, thoroughly enjoyed it!**
Fantastic session – hugely inspiring

Thank you for a really fab day
Practical writing skills workshop

A follow-on course to our Masterclass, this practical session helps proposal contributors to fine-tune their writing style – significantly improving the professionalism of their content. We’ll review essential tools needed to write clearly and fluently. We’ll also draw upon best practice from proposal writing, journalism and online media to help you to sharpen your skills and influence the evaluators. This is an ‘every little helps’ course: the more you apply, the more impact you’ll have.

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

• Getting the structure right
• Being clear and concise
• Mastering tone of voice
• Focusing on the customer
• Creating hard-working headings
• Overcoming grammatical and consistency errors
• Proper punctuation
• Making it sound joined-up
• Writing from scratch with confidence
• Learning, action planning and feedback

Audience

Sales leads

Content contributors

Bid / proposal specialists
It’s essential that your most senior executives 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’.

- 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
  - Action planning
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.

- 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
- Learning, action planning and feedback

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.
Executive summary masterclass

• 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
• Learning from the event & action planning
• Course feedback

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.
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.

- 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
- Learning from the event & action planning
- Course feedback

Audience

- Sales leads
- Senior managers
- Bid / proposal specialists
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.

- Introductions and scene-setting
- Key principles of effective proposal content and structure, using a case study
- The goals and benefits of a successful proposal 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
- Learning from the event & action planning
- Course feedback
Great training delivery – very energetic and inspiring

Very useful and inspiring! Thank you
Extremely useful and enjoyable course!
Proposal excellence in a day

An intensive full 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.

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 2011”?
- Proposal output: how do your submissions compare to contemporary best practice?

Part 3: Action planning
- Modelling the potential benefits of an improved approach
- Next steps: an outline improvement plan
- Course feedback

Audience
Senior managers
Winning your next proposal - workshop

Part 1: Key proposal processes
- Introductions, objectives, warm-up
- Participants will be reminded of best practice at each of various key stages of the proposal process, and asked to document and share how they intend to apply those techniques to their sample deal. Areas to be covered will include:
  - Qualification
  - Pre-proposal planning (including the potential for producing pro-active and/or renewal proposals)
  - Proposal strategy development and win themes
  - Content development and writing skills
  - Peer reviews (‘red team’)

Part 2: Proposal output
- We’ll introduce seven criteria used to benchmark proposal output, then practice scoring content using case study material extracted from one of your recent proposals
- Attendees will then work individually to score their own sample output, to identify potential improvements, and to share learning

Part 3: Conclusions and next steps
- Learning from the event & action planning
- Process for monitoring success on their sample deal
- Course feedback

Attendees will be asked to identify a sample bid on which they are currently personally engaged (or one they have worked on recently), and to bring a sample of proposal output that that have submitted recently.

This practical course ensures that the knowledge gained during the Masterclass is being put into practice in the real world. We’ll refresh participants’ knowledge of the key stages of the proposal process – and get them to work through how they’ll deploy best practice on a current or known future proposal.
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.

Even the best-trained teams sometimes need additional support in the heat of the battle.
We engaged Strategic Proposals to help bring a re-energised focus on our bid processes. They trained over 100 people, from 18 different countries, either face to face or via webinars. Their passion and knowledge for their subject, added to their ability to energetically engage with an audience, created positive results which enabled a cultural change in our business’s approach to pitching. We definitely won more business due to their work.

Group Sales Director, Business Services
In addition to encouraging your bid / proposal specialists to join the courses offered for sales staff and content contributors, we also offer more advanced training specifically relevant to their needs.

They include:
• a two-day in-depth version of our award winning Masterclass
• professional certification workshops for APMP’s qualifications
• a new proposal writing bootcamp
• advanced modules on key areas - such as auditing proposal quality, leadership and managing pre-written content for improved proposal operations.
Bid & proposal specialist skills framework

The necessary proposal skills & certification for your bid & proposal specialists

**Core content**

- Winning proposals masterclass
- Coaching the pitch team

**Professional recognition**

- APMP Foundation workshop & exam
- APMP Practitioner workshop & coaching
- APMP Professional coaching
- Proposal awards programme

**Advanced skills for proposal specialists**

**Sharpen your output**
- Proposal editing bootcamp
- Proposal design masterclass
- Managing pre-written content

**Leading the process**
- Auditing proposal quality
- Document management & design essentials
- Leading winning proposal teams
- Facilitating proposal excellence
Winning proposals masterclass
for bid and proposal specialists

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.

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
- Learning from the event – including practical exercise and personal action planning
- Course feedback

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

- 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.
- Learning, action planning and feedback

Audience

Bid / proposal specialists

Pre-requisite: attendance at our “Presenting to Win” course, to understand the characteristics of a high-impact contemporary pitch
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) - using the new APMP syllabus launched in May 2016. 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.

We’ve helped over 2,000 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**

- On the day, we cover:
  - An overview of the APMP certification scheme
  - Explanation of the exam process
  - Detailed review of the topics within each of the five key competency areas in the APMP Foundation Level syllabus
  - Candidates then sit the paper-based version of the exam at the end of the training
  - Exam papers are marked at the end of the course, and results (pass / fail) are fed back to candidates on a 1:1 basis
  - Successful candidates are entitled to use the designation ‘CF APMP’, and will receive their certificates from the exam board around one month after the course.

Since the APMP session doesn’t include the opportunity to review real-life proposal content, the Masterclass is a key pre-requisite to this event for companies seeking to improve proposal quality as well as to accredit their staff.

Where English is not the first language of the group, we run the event over two days given the volume of material to be covered.

**Audience**

**Bid / proposal specialists**

APMP requires examination candidates to have at least one year’s experience in a bid / proposal environment

Candidates must be fluent in spoken and written English (the language of the examination)

Attendees will be provided with an online copy of APMP’s “Foundation Study Guide”, which they will need to read in advance of the course. A printed copy of this textbook, and of APMP’s Glossary, will be provided on the day of the course.
The second tier of APMP’s certification scheme requires candidates to demonstrate their experience of applying good practice in over thirty aspects of proposal development. This session enables participants to storyboard their key answers for their Proposal Practitioner Assessment Questionnaire (PPAQ) – and hence to fast track their approach to submitting paperwork to the necessary standards.

- The training syllabus covers:
  - Overview of the APMP Practitioner assessment process
  - Hints and tips for answering PPAQ questions
  - Review of the topics within each of the competencies within the APMP Practitioner Level syllabus, enabling participants to storyboard their answers to each topic
  - The role of the Practitioner referee
  - Personal action planning
- Candidates then prepare their PPAQ after the course and submit this direct to APMP. It is recommended that three half days are set aside in attendees’ diaries in the month following the course, to enable them to work on their submissions
- Peer review support is offered by email by the trainer after the course, to review and comment on the first five draft PPAQ answers from each delegate
- Successful candidates are entitled to use the designation ‘CP APMP’, and will receive their certificates from the exam board around one month after their paperwork has been assessed by APMP
We’ll structure our coaching support to fit around your schedule, and this will include:

- Introductory briefing, with advice on developing the PPIP
- Review of two drafts of the PPIP, offering constructive criticism before it’s submitted to APMP
- Briefing on the Professional interview: what to expect, and how to plan answers.
- Successful candidates are entitled to use the designation ‘CPP APMP’, and will receive their certificates from the exam board around one month after they have passed their Professional interview.
The programme will be tailored to your culture and environment, and will typically include:

- Agreement of judging criteria and personnel
- Development of collateral to promote the awards scheme
- Collating submissions from your staff
- Review entries against agreed criteria
- Co-ordinating scores from judges, and chairing a review meeting with judging panel to finalise the list of winners
- Presentation of a suitable award, and support for internal communications.

An internal awards programme that helps to ensure that your bid and proposal staff are applying the best practices covered in their training, delivering tangible business benefits - whilst recognising and rewarding success.
I found the whole course energising and worthwhile. The snippets of new ways to do things are particularly helpful and easy to implement. I think it’s a great benchmark for all proposals staff in WSP to have attended this course.

Everyone who is involved with the tender process would benefit from attending this course.
Fantastic presenter and clear takeaways that will definitely help me – many thanks!
Writing professionally and editing others’ content are critical skills for bid and proposal managers (and others in your proposal centre). This intensive development programme is designed to ramp up the quality of the team’s written work, equip participants with improved skills for editing others’ material, and to write significantly more persuasively.

Day one: writing professionally
We’ll start by going ‘back to basics’, ensuring team members avoid common pitfalls in areas such as grammar and punctuation, via a series of engaging quizzes. We’ll look at tone of voice, writing with style, and techniques for making your content flow naturally from the page. We’ll use numerous practical exercises. As a result, the team’s writing style will be more consistent, more accurate and more engaging: a joy to read for the evaluation team.

Day two: coaching
At the end of the first day, we’ll set participants a writing assignment, to be submitted to our course facilitator. We’ll review their output, testing their writing style, and then provide constructive feedback in series of 1:1 coaching sessions.

Day three: writing persuasively
The final day of the bootcamp will focus on writing content that’s truly compelling. We’ll explore APMP’s latest published advice on persuasive proposal writing, as well as drawing on influencing techniques from other fields such as behavioural economics. We’ll explore tactics for capturing and editing content from proposal contributors (such as salespeople and subject matter experts). And there’ll be practice exercises throughout, ensuring that participants end up writing content that truly differentiates you from the competition.
A workshop combined with 1:1 coaching, enabling participants to assess the quality of their own proposals using a structured benchmarking approach, and to highlight potential improvement areas.

Part 1: training course
- Introduction and scene-setting
- Case study 1: a short generic case study designed to introduce the audit framework
- Proposal quality assessment: introduction to the seven criteria used to benchmark proposal output
- Case study 2: rating one of your recent proposals against the criteria - identifying scores, what works well, and opportunities for improvement
- Implementing an effective proposal quality assessment process
- Learning from the event & action planning
- Course feedback

Part 2: coaching
- Participants provide a hard copy (by post) of a recent short proposal to be ‘scored’, as well as reviewing the document themselves
- One hour 1:1 feedback session reviewing scores, what works well, and recommendations for improvement
“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.

- 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
- Learning from the event, action planning and course feedback
An expert view of the very best 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.

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

Learning from the event, action planning and course feedback

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

Can be split into two half-day workshops

ONE DAY
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

- 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
- Learning from the event & action planning
- Course feedback

Bid / proposal 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.)
Strategic Proposals have delivered sales proposal courses for us for six years and have always delivered outstanding sessions with superb results. We have seen delegates’ performance improve significantly, with practical actions they could take to ensure learning is transferred to their daily work. They are extremely well thought of in our business across Europe and this reputation is the result of consistently delivering outstanding training: I would recommend them to anyone looking to improve their win rates.

Head of Bids, IT
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.

- 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:
  - Pre-engagement - or not!
  - Building and engaging the response team (including how to lead a truly effective kick-off)
  - Defining roles and responsibilities
  - Establishing credibility, authority and rapport
  - Injecting passion for the proposal process – and for ‘doing it right’
  - Identifying and managing the risks to submitting a winning proposal on time
  - Managing communications with the team, individuals and stakeholders
  - The role of the executive sponsor
  - Contributor chaos: how to handle difficult or struggling salespeople and subject matter experts
  - The ‘out of control document’
  - Rogue reviews
  - Production pain
  - What happens next, after the proposal’s been submitted?
- Summary and close
- Course feedback

Audience
Bid / proposal specialists

NEW COURSE
ONE DAY
Facilitating proposal excellence

Our process excellence courses outline best practice at key stages of the proposal process. Bid and proposal specialists then need a deeper dive into these topics than other team members, to enable them to manage each of the processes successfully.

- Workshops are available on the following topics:
  - Qualification and pre-proposal planning
  - Proposal strategy
  - Content design / storyboarding
  - Reviews and governance
  - Learning reviews
- In each case, we explore the practicalities of running the relevant stage of the process, and techniques for facilitating any relevant workshops. As a result, participants will be able to steer the team through these key activities with greater confidence and success
- Content in each case follows on from the half day process excellence workshops, which may be run in the morning to make a full day event on each topic
- Depending on the needs of your team, we offer a range of additional development activities to enhance performance over a period of months, including 1:1 coaching and mentoring to help your staff to realise their full potential
I have seen a measurable step change in win rates as a result.
We’re proud that projects in which we’ve played a key role have won the annual "People Development Award" from the UK Association of Proposal Management Professionals for our clients in each of the past two years – Capita in 2014 and Vodafone in 2015.

Jon Williams – our UK Managing Director – was shortlisted for the UK’s "sales trainer of the year 2015" award (British Excellence in Sales & Marketing Awards).

The Strategic Proposals team was a finalist in the UK Sales Team of the Year 2016 award, run by the Institute of Sales & Marketing Management – reflecting our track record in helping clients to win business.

As an APMP Approved Training Organisation since 2007, we’ve helped over 2,000 people attain APMP certification. Our candidates score significantly above the average mark in APMP’s Foundation Level exams, and our pass rate is unparalleled.
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 +44 (0)7818 634458