



Bridging the gap between the Sales Manager and the Proposal Manager

15 Year Jubilee congress

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Introduction to the Business Development Lifecycle

By positioning products or services early and building strong customer relationships, organizations improve their probability of winning a contract.

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- At the core of most organizations' success is business development — the ability to generate revenue that sustains the business or organization.
- A key goal of any business development team is to advance a business opportunity and move toward being in a favored position from the customer's perspective

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Advancing an opportunity through sales stages helps move an organization from an unknown position in the market to a known position. Through effective marketing, opportunity, and sales activity, organizations attempt to advance to an improved position with the customer and ultimately be the solution of choice in a favored position.

Unknown position. Early in the business development lifecycle, many companies are in unknown positions with potential customers. Through effective marketing and long-term positioning, companies achieve known positions.

Known position. Using their brand, market messaging, and early sales strategies, companies develop known positions in relation to potential customers.

Improved position. Effective relationship-building strategies and selling skills can advance companies into improved positions with potential customers.

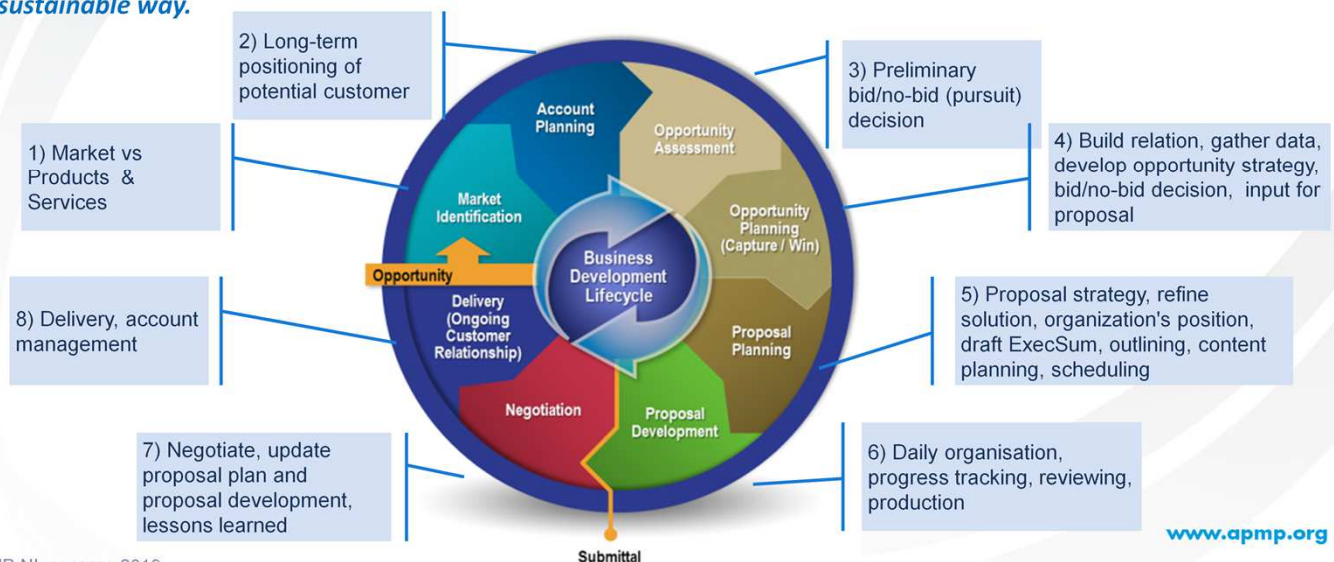
Favored position. In many market segments, organizations collaborate with customers to develop a business case based on customer needs, issues, and hot buttons. This collaboration builds trust and helps put companies into a favored position with customers.

Phases in the Business Development Lifecycle



The business development lifecycle is about winning business. A clear business development process based on best practices can help organizations identify opportunities and win bids in a repeatable, sustainable way.

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Defining, documenting, and implementing an effective business development lifecycle is a core part of strategic planning for any business.

Organizations must remember to:

- Scale and tailor the cycle to specific markets and competitive positions
- Clearly define roles and responsibilities within the cycle
- Secure leadership buy-in and support for implementing the cycle
- Document all successes and failures to learn from experience
- Enhance the customer relationship across the cycle at each phase and as part of each activity

The work phases of the Sales Manager and the Proposal Manager



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Bid/no-bid decision

- Can be taken anywhere in the Opportunity planning and/or Proposal Planning phase
- Moment can be opportunity driven or determined by the company's process reference system

Roles

- Many different role titles exist: Sales Manager, Sales Lead, Account Manager, Opportunity Manager, Bid Manager
- Different roles may be executed by a single person

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Opportunity Manager

The Opportunity Manager identifies the resources needed to pursue a business opportunity. The Opportunity Manager oversees bid strategies, pricing, teaming, and proposal strategies and manages the transition from business opportunity to proposal development to award.

An Opportunity Manager can have a variety of titles depending on the setting:

- In U.S. government settings, the Opportunity Manager is often called the Capture Manager.
- In commercial settings, the Opportunity Manager may be the Account Manager, Sales Lead, or Sales Manager.
- In U.K. and European settings, the Opportunity Manager may be the Bid Manager.

Equivalent Terms:

Account Manager, Bid Manager, Capture Manager, Sales Lead

Bid Manager

A Bid Manager is responsible for managing a bid or proposal opportunity from qualification to contract award, including:

- Early and ongoing strategy development
- Legal review
- Solution development
- Winning price development
- Partner identification
- Risk management
- Proposal development
- Stakeholder management

The Bid Manager often manages the customer relationship for the procurement.

Proposal Manager

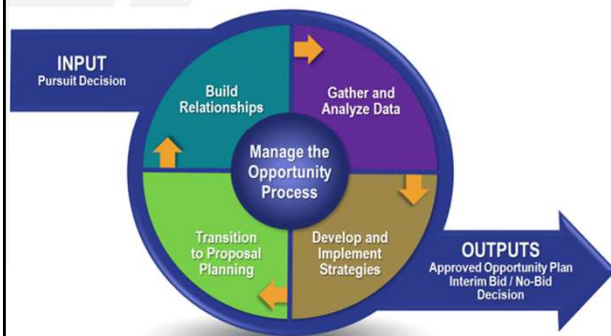
A Proposal Manager is responsible for proposal development (e.g., written, oral, and demonstrations), including maintaining schedules, organizing resources, coordinating inputs and reviews, ensuring bid strategy implementation, ensuring compliance, resolving internal team issues, and providing process leadership.

Phase 4: Opportunity Planning



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Opportunity planning starts early in the lifecycle and continues through proposal submission. This planning involves customer interaction and effective sales to understand customer needs and issues.



Critical aspects of opportunity planning include knowledge of portfolio management and the 4Cs:

- Customer
- Competition
- Cost
- Company and solution
- Portfolio management

Opportunity planning activities are critical to success in business development.

Regardless of the size or complexity of an opportunity, a Sales or Opportunity Manager should take time to plan. The plan's level of detail will depend on the opportunity, including complexity and value.



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Opportunity planning starts early in the lifecycle and continues through proposal submission. This planning involves customer interaction and effective sales to understand customer needs and issues. Critical aspects of opportunity planning include knowledge of portfolio management and the 4Cs:

- **Customer.** Organizations need a basic understanding of the customer's situation, needs, hot buttons, issues, and biases. This understanding will deepen as the opportunity advances.
- **Competition.** Opportunity planning involves careful and thorough analysis of the competition. Organizations should identify whether there is an incumbent, known competitors, or potential unknown competitors. They should also determine whether they have a competitive [advantage](#) or disadvantage in pursuing the opportunity. Other potential "competitors" might be the customer deciding to do nothing, spend money on other things, or do the work in-house.
- **Cost.** Is there a history of pricing on this opportunity? A price-to-win analysis, at some level, should be part of opportunity planning. As the opportunity advances and more information becomes available, this price target should be adjusted.
- **Company and solution.** Opportunity planning requires that an organization assess, from a customer perspective, its own solution, past performance, reputation, and risk.
- **Portfolio management.** Weigh opportunities against each other and view resources to develop and pursue opportunities as an investment. Only pursue opportunities with an ROI versus probability of win that supports the overall portfolio.

Keep in mind that this process does not always go in this order; the qualification decision may need to be revisited as you learn more about the customer and the opportunity.

This slide shows how the pursuit decision leads to the opportunity planning phase of the business development lifecycle. A thorough opportunity plan should evolve from this phase of the cycle.

Phase 5: Proposal Planning or better: “Proposal Design”

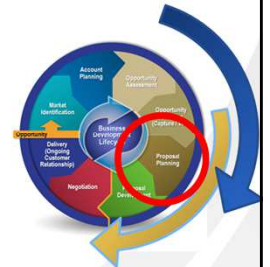


If done effectively, planning a proposal will save time, resources, and money. Before the bid request arrives, organizations should assemble a core proposal team to prepare a proposal management plan focused on the five proposal planning activities.

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Focus on these five key proposal planning activities:

- Migrating data from the opportunity plan to a proposal plan or to proposal planning tools
- Extending the opportunity strategy into the proposal strategy. A proposal strategy consists of statements of an organization's position and how it plans to make each point in its proposal. Organizations can capture this transfer by preparing a draft executive summary.
- Refining the solution and price-to-win
- Engaging the right staff for the proposal team and securing the right executive support
- Holding a proposal kickoff meeting to share planning activities with the proposal team



In completing these activities, an organization should conduct a review to validate and suggest improvements to its proposal strategy.

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If done effectively, planning a proposal will save time, resources, and money. Before the bid request arrives, organizations should assemble a core proposal team to prepare a proposal management plan focused on the five proposal planning activities. These activities are essential to transferring customer issues and needs identified during opportunity planning into proposal strategies, solutions, a price-to-win, and mitigations.

Focus on these five key proposal planning activities:

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- Refining the solution and price-to-win
- Engaging the right staff for the proposal team and securing the right executive support
- Holding a proposal [kickoff meeting](#) to share planning activities with the proposal team

In completing these activities, an organization should conduct a review to validate and suggest improvements to its proposal strategy. The opportunity plan review team reviews the technical, management, and pricing solution against the customer's needs and requirements, alignment with the opportunity strategy, and competitive focus.

Adjustments made at this time, especially before the bid request comes out, help to maintain the alignment between pre-proposal activities and solutions and the proposal's description of these solutions. Often, organizations use mockups and content plans as proposal planning tools that make proposal development and writing more customer focused.

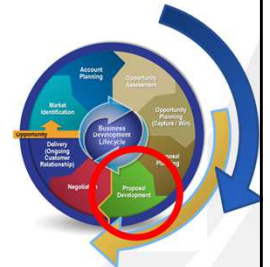
Phase 6: Proposal Development or better: "Proposal writing and production"



As the opportunity matures and a formal bid request is released, proposal development kicks into high gear. The planning documents prepared in the previous phase now become working proposal development documents.

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- After designing the proposal the production can start:
 - Writing new text
 - Editing existing (boilerplate) text
 - Making / editing graphics, photo's, video's
 - Making compliance matrices, response matrices,
- The Proposal Manager organises this phase and directs the team. He tracks progress by organising (stand-up) progress meetings and using tracking tools.
- Relevant reviews are organised and after approval the proposal is printed, packaged and submitted.



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As the opportunity matures and a formal bid request is released, proposal development kicks into high gear. If the opportunity is still viable, then the planning documents prepared in the previous phase now become working proposal development documents.

At this stage, bid planning activities, including changes to the solution, strategy, teaming partners, proposal organization, proposal schedule, and workshare, should stop. Ongoing changes result in wasted time and resources and can lead to a mediocre proposal that is frustrating to prepare.

Organizations should use compliance tracking tools, such as compliance checklists, response matrices, and writers' assignments, to ensure that they are meeting the requirements of the bid request. They should also use communication tools to validate progress, troubleshoot proposal content, and address concerns. Finally, they should conduct short check-ins to monitor progress and status to ensure that deliverables and schedules are met.

When Proposal Managers are satisfied with section drafts, they should submit them for final review. A team should review a complete draft proposal beginning with the executive summary, all volumes (including cost), and other items required at submittal. A final document review team evaluates the draft proposal from the customer's perspective.

The review team makes recommendations for improvement. After completing changes and receiving final approval, the proposal is submitted to the customer. Organizations vary in how they execute the proposal development process based on the nature of their business and the complexity of bid they submit.

The notorious gap... somewhere between Opportunity Planning and Proposal Planning



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■ Different issues can be found that cause this gap (generalised 😊)

- The Sales Manager
 - Is always out of office and has **not documented** what he knows
 - Does not agree with **the proposal plan**
- The Proposal Manager
 - Has not supported the Sales Manager defining **the winning solution** for the customer
 - Does not agree with the **capture strategy**
- The organisation
 - Has no **Business Development process** in place
 - Failed to hire **knowledgeable personnel**

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Bridge the gap: Linking Opportunity Planning to Proposal Planning



To bridge the gap good communication is essential. So let's meet, write down what you know and work as a team!

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WHAT THE SALES MANAGER CAN DO

- Write an Opportunity Plan, 60% will flow down in a Proposal Management Plan
- Support the Proposal Manager in strategy refinement and implementation in the proposal
- A draft Executive Summary guides the proposal team
- Keep customer contact on behalf of the proposal team
- Lead, guide or contribute to post-bid submittal interactions with the customer

WHAT THE PROPOSAL MANAGER CAN DO

- Write an Proposal Management Plan, 60% can be re-used from the Opportunity Plan
- Support in capture strategy
- Guide solution development and costing
- Support the Sales Manager with bid budget preparation
- Refine opportunity strategy into proposal strategy
- Support in price to win estimations
- Support in presentations for the customer

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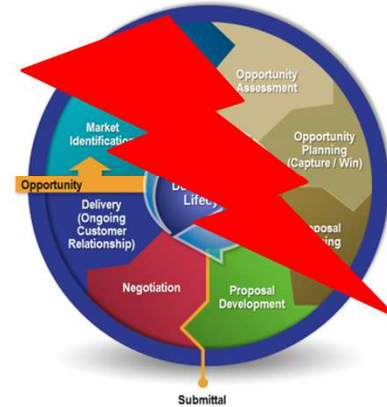
Bridge the gap

How the organisation can help



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- Have a process in place
 - Business development
 - Bid / proposal management
- Have knowledgeable personnel
 - “Make the right people available, don’t make the available people right”
- Full support by the management



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Bridge the gap: Opportunity Plan



Opportunity (or Capture) plans are useful tools for sellers to improve customer positioning. They document the actions and capabilities required to meet customer needs and win bids. They evolve in time. They pass information on to the proposal team.

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Why an opportunity plan

- Drive and track all opportunity/sales activities to improve customer positioning
- Provide information for gate decisions
- Brief review teams (competitor, opportunity, proposal strategy review teams)
- Provide handover to the core proposal team to develop the proposal plan
- Create content and lessons learned that can be used in subsequent pursuits

Who writes the plan

- Sales Manager (Opportunity Manager)

When

- After the opportunity pursuit (gate) decision

Means

- Word, Powerpoint, Sharepoint, webbased application,...

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The purpose of opportunity planning is to advance the opportunity to consistently improve a seller's position to ultimately win business.

Long before the RFP is released, your prospective customer is forming opinions of potential suppliers. The goal of any business development or sales team is to advance each opportunity toward a favored (winning) position from the perspective of the customer.

Planning your approach by researching your prospect's needs, assessing the competition, and investing in the right opportunity planning team members pays off, both saving bid preparation time and positioning your company as a winner. And better allocation of your time and resources can improve your win rates. An opportunity plan documents current customer positioning and how a seller will move from an unknown position to a known position, an improved position, and finally, a favored position. It is particularly valuable where the sales cycle is long, taking months or sometimes years.

Potential bidders who use opportunity planning may ultimately decide that a favored position is either not possible or not desirable, prompting a no-bid decision long before resources are committed and consumed in preparation of a proposal.

Opportunity plan: typical content & tooling



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■ Content

- Opportunity overview
- External analysis (detailed description of the opportunity and its requirements, a customer analysis, and a competitor analysis)
- Internal analysis (the solution; your experience; your risks and opportunities; and pricing)
- Strategy development (customer communication and intelligence gathering, win strategy, risk management)
- Action plans
- Execution and monitoring
- Draft Executive Summary

■ Tooling used

- Contact plan
- Summary Sheet of Key Information (Integrated Solution Worksheet)
- Black Hat review
- Creativity/brainstorm session
- Bidder Comparison Matrices
- Action item trackers
- Strategy statement templates
- Executive Summary template

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Activities for Opportunity planning:

1. Gather and analyze intelligence about the customer and the competition
2. Work collaboratively with the customer to craft a solution addressing explicit requirements and hot buttons
3. Develop program, opportunity, and proposal budgets
4. Initiate teaming and make/buy decisions
5. Conduct opportunity plan and competitor simulation reviews
6. Mock up an executive summary
7. Guide transition of opportunity plan elements to the proposal plan
8. Develop and lead decision gate reviews.

Opportunity plans can be time-consuming to create, and teams may be eager to complete an opportunity plan before focusing on other tasks. Keep in mind, however, that an opportunity plan must be developed collaboratively with a customer. Spending time with your customer can improve your position (or reveal that you are unlikely to achieve a favorable position). Interacting with the customer during opportunity plan development benefits your company in the long run.

Bridge the gap: Proposal Management Plan



Proposal management plans, or bid plans, are used to allocate effort, structure work, and ensure adherence to timelines throughout the proposal development process.

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- Why a proposal management plan
 - Plan and organise proposal production as a project
 - Refines opportunity strategy into proposal strategy
 - Briefing / aligning the team
 - Plan and organise proposal outline & content before writing starts
 - Proposal strategy and content plan are the basis for reviews
- Who writes the plan
 - Proposal Manager (Bid Manager)
 - Supported by Sales Manager and team members
- When
 - First draft before the bid/no-bid decision, fully ready before the Kick-off meeting
- Means
 - Excel, project schedule tooling, Word, Powerpoint, Sharepoint, webbased application,...

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Proposal Management Plan: typical content & tooling



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Content

- 60% is comes from the Capture Plan!
- Project summary
- Customer profile
- Competitive analyses
- Proposal strategies and themes
- Staffing, roles and responsibilities
- Proposal operations (war room, storyboard...)
- Schedule
- Proposal outline & content
- Writers information
- Preliminary Executive Summary

Tooling used

- Opportunity plan
- War room
- Summary Sheet of Key Information (a.k.a. Integrated Solution Worksheet)
- Bidder Comparison Matrices
- Strategy statement templates
- Executive Summary template
- Proposal templates / style guide
- Responsibility matrix
- Compliance matrix
- Past performance library
- Storyboards
- Boilerplate text library
-

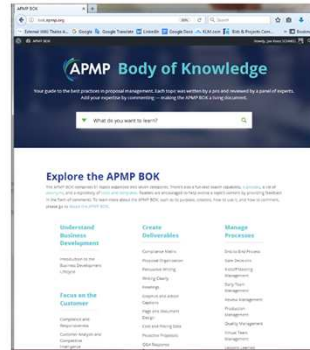
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Reference and resources



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- APMP Body Of Knowledge
- Writing Business Bids and Proposals (for dummies)
- Shipley Proposal Guide, Capture Guide & Business Development Lifecycle Guide



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End of presentation

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