



Proposal Development Training

C O U R S E C A T A L O G



- Capture Management
- Pricing Strategies
- Win Theme Development
- RFP Shredding
- Compliance Matrix Development
- Proposal Management
- Proposal Coordination
- Proposal Writing
- Desktop Publishing
- Graphic Design
- Past Performance
- Solo Proposal Development

Flexibility. Scalability.

P3 Solutions, LLC

1451 Dolley Madison Blvd.
Suite 310
McLean, VA 22101
Phone: 703-448-3500
Fax: 703-448-3510

www.p3solutions.net



Table of Contents

P3 Proposal Development Training Overview	1
Capture Management.....	2
Win Themes and Win Strategies	4
RFP Shredding	5
Compliance Matrix Development	6
Proposal Management	7
Proposal Coordination	8
Proposal Writing.....	9
Desktop Publishing	10
Graphic Design for Proposals	11
Past Performance	12
Solo Proposal Development.....	14

P3 Proposal Development Training Overview

P3 Solutions is your one-stop resource for professional training.

We offer best practices, lessons learned, and creative solutions to common problems. We've trained our clients to:

- Define and implement successful BD and capture strategies
- Analyze and interpret RFPs, RFIs, RFQs, etc.
- Define and refine win themes—then make sure they make it into the proposal
- Effectively manage and coordinate proposal efforts
- Dramatically improve ROI and win rates
- Use technology more effectively

Tailored solutions

Our training is tailored to fit you. P3's modular courses can be customized so you can focus on just what you want to know. You can come to us or we'll come to you; we can train one person or 100.

We don't just train private-sector BD personnel. Government acquisition professionals like Contracting Officers, COTRs, and Contracting Specialists can benefit from P3's training on the RFP and proposal life cycle. We help Federal agencies understand the industry's perspective, preempt questions and challenges, and streamline the acquisition process.

Contact us for more information about additional training courses and let us put together a solution that meets your needs.

Experience

P3's training is grounded in the real-world experience of our personnel. Our trainers bring an average of 20 years of experience in business development, program /project management, and government contracting.

Capture Management

Are you ready to win?

Course Description

Winning new business in today's competitive environment is tougher than ever before. It's no longer enough to be an incumbent, merely respond to requirements, or just wait for new business to roll in.

Both industry and government organizations must develop win strategies, messages, and compelling content to win business and capture new contracts. This takes time, effort, and objectivity. Capture management also requires understanding of how to implement industry best practices to drive up win rates and keep B&P costs under control.



A major factor in winning business—both government and commercial—is developing a strong win strategy. Too often, strong technical or business solutions lose because of weak strategy. We'll show you how to define that strategy, make sure it carries through the proposal phase, and present it to your customer from a best-value perspective.

P3 offers a basic capture training course to those professionals tasked with winning large procurements. We specialize in de-mystifying the capture and proposal process, so that your professionals can successfully pursue opportunities.

How do we do this? We offer insights into industry best practices, our own lessons learned, and creative solutions to common pitfalls. During our interactive workshop, course participants can share their capture experiences. P3 will help build practical skills, walk through typical scenarios, discuss how to solve common problems, and improve their capture process.

Course Contents

P3 can help you learn how to:

- Understand and influence client requirements
- Define the win strategy
- Identify potential competitors and conduct SWOT analysis

- Identify main weaknesses and mitigation strategies
- Identify win themes and differentiators
- Identify competitive “ghosts”
- Plan the proposal and identify team members
- Develop the proposal approach
- Manage the proposal team
- Manage the budget

Course Objective

Training participants can expect to leave the class with a strong understanding of the power of sales messaging, strategy, and customer-focused benefits.

Win Themes and Win Strategies

Find the right message—and communicate it effectively.

Course Description

To win business in today's environment, it's not enough to just know what your value proposition is. You need to make sure that your win themes and strategic messages reach your intended audience.



At P3, we've developed hundreds of winning proposals, and we know that the best ones are those where themes, messages, and discriminators are seamlessly integrated into the proposal content. This course covers how to define and develop win themes and discriminators, and how to integrate those winning messages into a coherent, compliant, and compelling proposal.

Course Contents

P3 can help you learn how to:

- Understand client requirements
- Define the win strategy
- Identify potential competitors and conduct SWOT analysis
- Identify main weaknesses and mitigation strategies
- Identify win themes and discriminators
- Identify competitive “ghosts”
- Get themes and discriminators into the proposal

Course Objective

This course is intended for proposal and business development professionals. Attendees will learn how to define and refine win themes, as well as how to more effectively incorporate those themes into proposal content.

RFP Shredding

How to decode a government solicitation.

Course Description

Proposal professionals typically have a very specific way of reading a solicitation: What we often call “shredding” an RFP. The solicitation gives you the recipe for a successful proposal, but sometimes interpreting it correctly is a daunting challenge. Requirements can be obscure, even contradictory.

You can improve your proposals, kick-start your writing process, and avoid compliance problems by learning how to analyze and interpret a government RFP/RFI/RFQ. For situations where a solicitation is vague or confusing, learn how to ask the government for clarification—in a way that can influence the customer in your favor.

Course Contents

- Instructions (Section L)
- Evaluation criteria (Section M)
- Scope of work elements (Section C)
- Contractual information (Section B)
- Clauses (Section I), attachments, and other
- Dealing with inconsistencies, ambiguities, and conflicts
- Asking good questions



Course Objective

This course is intended for proposal professionals. Participants will learn strategies for analyzing an RFP, with a focus on compliance. They will learn helpful strategies for quickly and effectively developing a practical understanding of a typical solicitation.

Compliance Matrix Development

The proposal professional's most important tool.

Course Description

The compliance matrix is an indispensable tool for developing a winning proposal. All too often, qualified vendors lose bids because they fail to comply with requirements. Learn how to: develop a thorough compliance matrix that captures everything you need to know, present the information clearly, use the matrix to guide your proposal development, and check compliance before submission.

Course Contents

Analyzing the RFP

- Instructions (Section L)
- Evaluation criteria (Section M)
- Scope of Work Elements (Section C)
- Contractual information (Section B, Section I), clauses, attachments, and other

Developing a compliance matrix

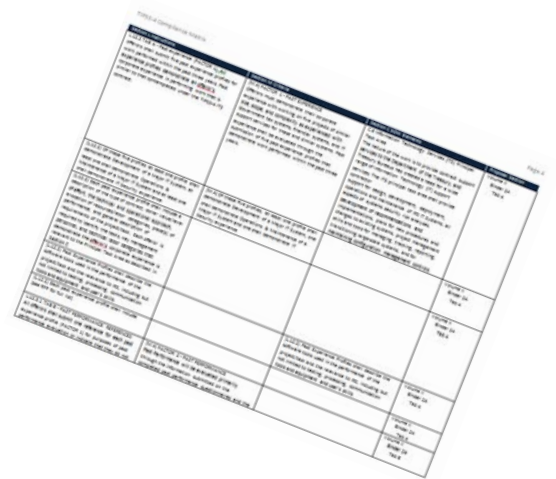
- Formats
- What to put in... and what not to
- Dealing with conflicts and ambiguities

Using a compliance matrix

- Developing the proposal outline
- Driving content development
- Checking compliance

Course Objective

This course is intended for proposal professionals. Participants will learn strategies and analyzing an RFP, with a focus on compliance. They will learn how to develop a compliance matrix as well as how to use it to help determine the structure and content of the proposal.



Requirement	Response	Compliance
1. Provide a detailed description of your company's experience in providing similar services to those requested in the RFP.	Our company has provided similar services to those requested in the RFP for over 10 years. We have a proven track record of delivering high-quality results on time and within budget.	Yes
2. Provide a detailed description of your company's financial strength and ability to complete the project.	Our company is financially strong and has the ability to complete the project. We have a strong balance sheet and a proven track record of completing projects on time and within budget.	Yes
3. Provide a detailed description of your company's personnel resources and qualifications.	Our company has a strong team of experienced professionals with the necessary qualifications to complete the project. We have a proven track record of delivering high-quality results on time and within budget.	Yes
4. Provide a detailed description of your company's equipment and facilities.	Our company has the necessary equipment and facilities to complete the project. We have a proven track record of delivering high-quality results on time and within budget.	Yes
5. Provide a detailed description of your company's safety record and policies.	Our company has a strong safety record and policies. We have a proven track record of delivering high-quality results on time and within budget.	Yes

Proposal Management

Learn a powerful, flexible process for proposal development.

Course Description

Learn how an expert proposal manager works, from start to finish.

Course Contents

Proposal Background

Proposal Planning

- Proposal Planning and Rules

Proposal Development Process

- Pre-Kickoff Meeting (Step 1)
- Kickoff Meeting (Step 2)
- Themes and Discriminators/Storyboarding (Step 3)
- Pink Team Review (Step 4)
- Pre-Red Team Production (Step 5)
- Red Team Review (Step 6)
- Gold Team Review (Step 6.5)
- Final Production and Delivery (Step 7)



Course Objective

This course is intended to help current and future proposal managers understand the proposal process and learn ways to structure and manage a typical proposal effort. Attendees will learn tips and tricks from successful proposal professionals.

Proposal Coordination

Make yourself indispensable.

Course Description

A proposal coordinator may wear a variety of hats: organizer, facilitator, formatter, writer, editor, and designer. A good one is valuable, a great one is indispensable. Proposal coordinators can benefit from learning tricks of the trade from our experienced professionals who have seen (and done) it all.

Course Contents

Proposal Process Overview

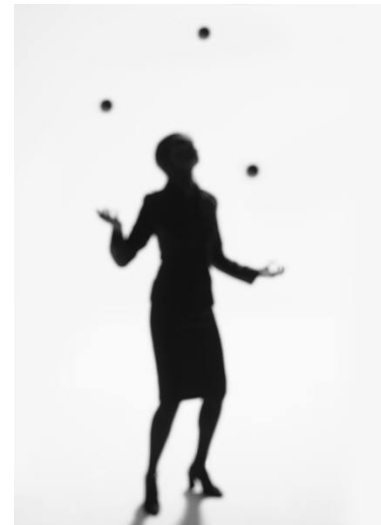
- Planning
- Development
- Reviews
- Production

The Coordinator's Role(s)

- Cat herder
- Formatter and designer
- Writer/editor/information compiler

Tips and Tricks

- The care and feeding of SMEs
- Version control
- Knowledge management



Course Objective

This course is intended to help current and future proposal coordinators better understand the proposal process and learn ways to support and enhance proposal efforts. Attendees will learn tips and tricks from successful proposal professionals.

Proposal Writing

Get the message down on paper.

Course Description

The deadline is breathing down your neck and you're staring at an empty screen and a blinking cursor. Or—perhaps worse—you've got reams of boilerplate and previous proposals, and you don't know where to start. Learn how to write a compelling, compliant proposal section.

Course Contents

Planning

- Outlines
- Storyboards
- Compliance
- Responsiveness

Getting it written

- Working with recycled material
- Starting from scratch
- Incorporating themes and discriminators
- Incorporating corporate experience

Editing and Revision

Managing a library

Course Objective

This course is intended for proposal writers, editors, coordinators, and managers who want to improve their writing—or just learn tips and tricks from successful proposal professionals. It is also intended for subject matter experts or program personnel who often need to write proposal content.



Desktop Publishing

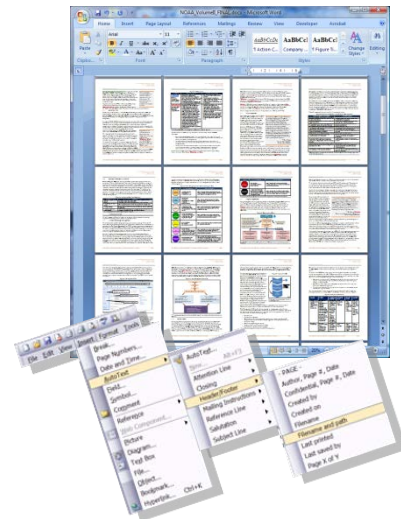
Make documents look good (even under the worst conditions).

Course Description

Formatting, word processing, and desktop publishing are instantly visible aspects of a proposal. Done well, they enhance and amplify the messages and the content. Learn ways to improve the way your proposals look, and also learn ways to work that streamline the process and save time and avoid production hassles.

Course Contents

- Working with templates and styles
- Complying with RFP requirements
- Developing a shell
- Controlling format during proposal development
- Working with recycled material
- Effective version control with multiple authors
- Working with graphics: tables, charts, and figures, oh my!
- Reviews, revisions, and editing
- Production
- Coping with disasters
- Time management
- Document and knowledge management



Course Objective

This course is intended for proposal coordinators, proposal managers, graphic designers, and word processing and desktop publishing personnel who regularly work with proposals. Attendees will learn ways to improve the final look of proposals, institute effective time-saving techniques, and learn methods for coping with the (perhaps inevitable) last-minute problems.

Graphic Design for Proposals

Create pictures that help tell (and sell) your story.

Course Description

Proposal graphics can be worth more than a thousand words. Sure, they “break up the text”—but wouldn’t it be nice if they did more than that? Learn how to conceive, develop, and manage proposal graphics, from simple charts and graphs to complex CONOPs and solution diagrams.

Course Contents

Concept Development

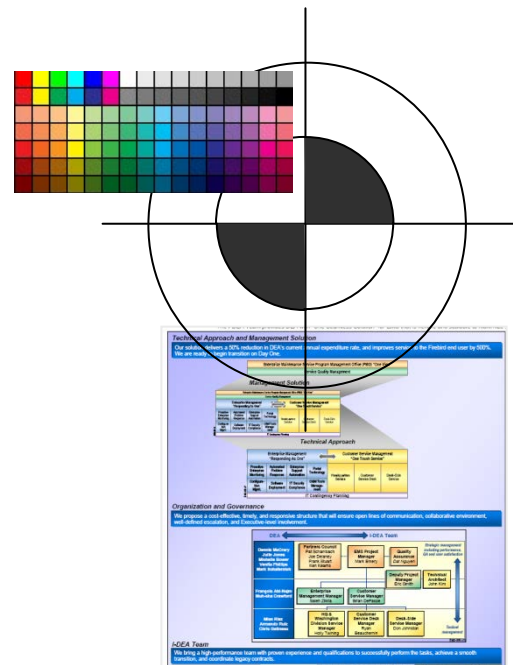
- Brainstorming
- Storyboarding
- Working with subject matter experts
- Drafting and refining graphics

Integrating Graphics into the Proposal

- Color schemes, fonts, and branding
- Gratuitous clip art and other pitfalls
- Production tips and tricks
- File size

Managing your graphics library

- Slug numbers
- Directory structures
- Intelligent re-use



Course Objective

This course is intended for graphic designers, desktop publishing staff, proposal coordinators, and others who may develop graphics (or direct the development of graphics) for proposals. Attendees will learn techniques for working with proposal teams to develop clearer, more compelling graphics that support and enhance proposal text.

Past Performance

Help your organization's experience shine through.

Course Description

The past performance section (or volume) is an important part of a winning proposal. Your potential customers use your experience as a guide to evaluate your qualifications, so you need to be able to put your best foot forward in your past performance documentation.

Learn how to select the most relevant projects, ensure positive evaluations, tailor writeups to specific requirements, and keep your past performance information organized and updated. This half-day course is intended for proposal coordinators, writers, and managers.

Course Contents

Planning the Past Performance Section

- Analyzing the RFP
- Creating a relevance matrix
- Creating a compliance matrix
- Creating a template
- Scheduling
- Researching and evaluating candidate projects
- Preliminary data calls
- Prequalification to ensure a positive evaluation
- Downselecting
- Contingency planning



Developing a Winning Past Performance Section

- Fine-tuning the relevance matrix
- Additional data calls
- Tailoring writeups to the solicitation (M-centric, C-centric, L-centric)
- Supplying nuggets for other sections
- Care and feeding of SMEs

- Writing the introduction
- Incorporating graphics
- Editing and reviews
- Questionnaire management

Ongoing Past Performance Activities

- Past performance knowledge management
- Reference tracking, rotation, and “do not reference” lists
- Information refresh: tailoring vs. updating
- Do you need a database?

Course Objective

Participants will learn the elements of a good past performance writeup, section, and volume. Other objectives include making intelligent past performance selections, and managing past performance information.

Solo Proposal Development

How to Be a “One-Stop Shop”

Course Description

Sometimes proposal professionals don't have the luxury of a large, fully staffed department. The proposal manager is the proposal coordinator... and also the graphic designer, formatter, editor, pricing analyst, and production manager. Plus she has to sweep up afterwards! Learn how to manage the process from start to finish.

Course Contents

Proposal Background

Proposal Planning

- Proposal Planning and Rules

Proposal Development Process

- Pre-Kickoff Meeting (Step 1)
- Kickoff Meeting (Step 2)
- Themes and Discriminators/Storyboarding (Step 3)
- Pink Team Review (Step 4)
- Pre-Red Team Production (Step 5)
- Red Team Review (Step 6)
- Gold Team Review (Step 6.5)
- Final Production and Delivery (Step 7)



Course Objective

This course is intended to help current and future proposal professionals who may work in small or one-person shops. Attendees will enhance their understand the proposal process and learn ways to handle the pressure of deadlines while maintaining quality. Attendees will learn tips and tricks from successful proposal professionals.