OST GLOBAL SOLUTIONS

B&P ACADEMY

OST Training Catalog

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1   About OST

OST Global Solutions was founded in 2005 by Olessia Smotrova, and we have won over $23 billion in funded contracts for our clients. We are a professional Business development, capture, and proposal consulting company supporting Government contractors win business. Our consultants deeply care about this country, and we believe in the value that Government contractors deliver in support of our Nation. Our purpose is to improve our country through better proposals. Applying our five core values deliver repeatable success for our clients:

1. **Engage with Content:** OST consultants learn what our clients do and dive into the details. Unlike intellectually lazy consultants who stay on the surface merely "managing the process," our consultants take ownership of the content to help develop the best solution possible for a specific proposal.
2. **Obsess About the Details:** Winning Government contracts requires precise responses to complicated technical requirements through compelling and compliant narratives and competitive pricing. Mistakes could disqualify the entire bid, costing jobs and impacting entire companies' livelihoods. Our quadruple-check everything because we understand and care about the impacts.
3. **Learn Continuously and Strive for Professional Excellence:** Government contractors are continuously seeking a competitive edge, and top Government contractors trust OST's consultants with their most important pursuits. Our consultants are teachers and students of the business development profession. It is too easy to fall behind and think in terms of "yesterday" when trying to solve today's problems. Our consultants are constantly reading, attending webinars and conferences, taking classes, and shadowing more experienced colleagues to learn and provide more value for our clients.
4. **Share and Carry the Load:** Winning proposals is a team sport. It requires dedication, long hours, and sometimes pushing past the point of exhaustion to get outstanding work done before the deadline. OST's consultants carry the load together, stepping up when our colleagues on the client or consultant side may need help. We take responsibility and work proactively to fix what needs fixing, even if it's not in our job description.
5. **Do Whatever it Takes:** Competing and winning at the highest levels of competition in Government Contracting is mentally and physically tough. OST consultants are dedicated to helping our clients succeed. We operate in high-stress environments, respond to challenging Government requirements, and sometimes work 12-hour days 7 days a week. OST is in the business of winning proposals not just completing them.

We have developed winning processes that are scalable from multi-billion-dollar bids to bids under the Simplified Acquisition Threshold. We will bring the process and quality control that helps win large, unrestricted competitions to help you win your next contract.

To support our clients, OST provides consulting and training solutions. This catalog shows our courses in detail. We are also available to discuss custom training options that are not described in this catalog. Reach out if you have any questions or would like to discuss your training needs.

2 Foundations of Federal Business Development

This training offers essential skills in professional business development for government contractors selling services and solutions to the Federal Government. You will gain an understanding of the Federal Business Development life cycle, learn how to navigate the US Government marketplace, perform strategic business development planning, dive into government market research and market analysis, master Federal marketing and government sales, understand the intricacies of opportunities pipeline development, and qualify opportunities to grow your Government Contracting business.

The two-day course begins with an overview of the federal business development (BD) process and what it takes to succeed in the profession. This course covers the basics of US government procurement and the nuances of winning government contracts. The course also explains how to conduct market research to identify Federal agencies as target customers and build a robust opportunities pipeline. The pipeline discussions cover a variety of techniques from determining your opportunity search criteria to prioritizing your pipeline.

The course discusses strategies for business development planning and instructions for engaging with federal customers. The course covers marketing to the Feds effectively using a government-focused capability statement, and it reviews techniques for engaging with reticent government officials who generally avoid meeting with government contractors. As a whole, the course is an interactive two-day workshop that is 50% lecture, 30% exercises, and 20% discussion.

By attending this Federal Business Development Training, the participants will learn and practice skills in:

- Understanding what skill sets and qualities it takes to succeed in the Federal Business Development profession.
- Getting and maintaining Government contractor registrations.
- Taking advantage of the Government's socioeconomic program benefits.
- Leveraging the SBA and other agencies' Mentor-Protégé Programs.
- Correctly determining company's business size and understanding its importance.
- Leveraging different forms of selling to the Federal Government.
- Performing market research to identify target Federal agencies, Government contacts, key competitors, teaming partners, and bid opportunities.
- Understanding the rules for government source selection and contract awards.
- Building an opportunities pipeline.
- Qualifying a bid opportunity to ensure the highest Pwin.
- Setting strategies for winning government contracts.
- Calculating business development budget.
- Securing visits to Government customers.
- Building effective relationships with Government officials.
- Developing business development collateral such as a high-impact government capability statement.
- Identifying venues for effective federal business development.
- Understanding capture management that's required to win a government bid.

Foundations of Federal Business Development Course Curriculum

Day 1 Highlights

Module 1: How to Succeed in Business Development

- Federal business development life cycle
- Four categories of actions for growth government contractors have to take to succeed in the federal marketplace
- A perfect Business Developer – how to become the secret weapon for your company's (and career's) explosive growth
- Federal Business Development skill set and essential qualities

Module 2: Foundations of Federal Contracting

- The basics of doing business with the government
- Taking care of registrations
- Federal market snapshot: who are the target agencies and buyers, and how to identify them

Navigating the Federal Acquisition Regulations (FAR) and agency guidelines

Module 3: Government Procurement Process

- Budgeting cycle and why budgeting is important
- Complex procurement process
- Determining your target agency's acquisition process

Module 4: Socioeconomic Programs

- Understanding and using socioeconomic programs
- Using SBA and other Mentor-Protégé Programs
- Understanding size in government contracting
- **Exercise**: Using a case study, determine what the company is missing in order for it to succeed in the Federal Market.

Module 5: How the Government Enters into Contracts

- Determining whether you need a GSA schedule
- Goals of business development and capture
- Competing single award contracts
- Competing for multiple award contracts

Securing sole source awards

- Understanding reverse auctions, grants, public-private partnerships, and R&D-related vehicles
- Understanding the impact of evaluation factors, Lowest Price Technically Acceptable (LPTA) vs. Best Value Tradeoff
- **Scenario-based Discussion:** Discuss strategies for different purchasing thresholds and evaluation criteria.

Module 6: Market Research to Find Customers

- Identifying agencies that buy what your company sells
- Identifying top contractors for the agency
- Conducting market research like a professional analyst
- Performing an initial competitive analysis
- Finding government contacts
- Getting maximum help from OSDBUs, vendor outreach events, and other methods of entering the agencies
- **Exercise:** Research a customer and competitors based on a company's core capabilities.

Module 7: How to Build a Solid Opportunities Pipeline

- Creating a balanced pipeline that's an engine of explosive business growth
- Implementing an integrated, multifaceted approach to finding government contracting opportunities
- How to use capture intelligence databases effectively
- Where to register to receive notifications of procurement opportunities
- How to get face time with the customer
- How to leverage your workforce and partners

Day 2 Highlights

Module 8: How to Obtain Sole Source Awards

- Reducing competition and winning sole source awards
- Adding scope to existing contracts
- Understanding regulations for issuing sole source contracts
- Understanding sole source award process for businesses not subject to statutory exceptions
- Writing unsolicited proposals
- Working with the government to facilitate a sole source award

Module 9: Additional Methods of Building a Pipeline

- How established government contractors create opportunities
- How to identify immediate opportunities to add revenue
- Additional techniques to attract opportunities to your company
- Networking venues for effective face-to-face business development

- Writing proposals for sole source procurements
- Writing effective J&As

Module 10: Strategic Business Development Planning

- Implementing the four main goals of a Strategic Business Development Plan
- Methodology for conducting a strategic business development planning session
- Transition to priming in a new market or as a new business
- Calculating a business development budget, and determining how many proposals you have to submit to achieve the desired growth
- Analyzing and expanding your core competencies
- Identifying Must-Win opportunities
- Winning business consistently in the government contracting area
- **Exercise:** Calculate a business development budget based on a scenario

Module 12: Transitioning to the Capture Process

- Qualifying an opportunity
- A review that kicks off the capture process

Components of the capture process

- Qualifying an opportunity to ensure it fits within your strategic BD plan, has a high win probability, and low execution risk
- **Exercise:** Qualify an opportunity

Module 11: Engaging with the Federal Customers

- Market your company to the Feds
- Marketing rules to the Government you cannot break
- Getting face time with the customer
- Becoming a trusted advisor
- Develop a high-impact capability statement specific to federal government customers
- "Wiring" contract scope to benefit your company
- Understanding four important goals of working with the customer
- Preparing for effective capture (and how an effective capture process will help you achieve beyond business development)
- Implementing low, medium, and high-cost marketing activities effective with the government

Exercise: Critique a capability statement to identify missing information and recommend improvements.

Module 13: Summary and Recap

- Recapping the course
- Checking knowledge
- Discussing takeaways and questions

3   Business Development for Project Personnel

This course is intended for subject matter experts (SMEs) and project personnel who are integral to a high-performing business development organization. The class covers how to become part of a company's growth engine and why it's important for project personnel to engage in the business development and capture process. It covers BD and capture concepts at a level ideal for project personnel and shows them specifically where in the process they can make the greatest impact.

Project personnel work alongside your government customers every day and understand their hot buttons, true "care abouts," and vision for the future. Training your project personnel on BD will give them an opportunity to help the Government solve critical challenges. This course teaches your project personnel how to increase the scope of your existing projects, deepen and improve your relationship with your customers, and find the most important information to win a specific contract.

Upon course completion, the participants will have learned and be able to put into practice:

- Reasons why your company needs project personnel to help in the BD life cycle
- Where and how project personnel fit in the BD process
- What your BD organization does
- Overcoming the reluctance to sell
- Understanding your customer's needs
- How to open dialogues with your customers about new opportunities
- How to collect intelligence while you are onsite

- What information and help your BD organization will need from you in working with the customer
- How to distill information from customer presentations and reports, and conversations with end users
- Gathering information ethically
- How project personnel can contribute to developing a solid win strategy
- How project personnel can add to competitive analysis, and help BD stay ahead of the competition

Business Development for Project Personnel Course Curriculum

Day 1 Highlights	
Module 1: Understanding Business Development as a Project Person	**Module 2: Understanding and Working with the Customer**
• Business Development (BD) life cycle and its key steps	• Four goals when working with the customer during capture
• Your job is not business development – or is it?	• Procurement basics
• Where and how you fit into the BD Process	• Why and how the government buys
• BD functions of onsite/project staff	• Five categories of customer and what role do they play in your company's BD success
• Where your roles fit with the BD organization's roles	• Talking about new opportunities with your customers
• Who is who in your BD organization	• Understanding your customer's needs and recognizing "pain"
• What your BD organization does	• Understanding your customer's psychology and motivations
• Opportunity identification	• Ethics rules of engaging with the government customer
• Capture management and six aspects of capture	• Describing your company's and/or team's capabilities correctly when meeting new contacts
• Proposal management other tasks to feed the "growth engine"	• Creating strong relationships and becoming a trusted advisor
• Overcoming the reluctance to "sell"	

Module 3: Serving as Liaison between the Customer and the Company BD Organization

- Recognizing a new opportunity
- Questions to ask the customer to collect information
- Shaping the opportunity and influence the requirements
- Why and how to vet your proposed solution
- How to communicate effectively with your BD organization
- What to expect from your BD organization
- What information your BD organization will need from you
- Portability of work to other contracting vehicles
- White papers exploring the problem and solutions
- Unsolicited proposals with company's solution

Day 2 Highlights

Module 4: Intelligence Gathering for Project Personnel

- What information your BD organization needs and why
- Collecting intelligence during project execution onsite
- How to collect intelligence at the site visits, proposal conferences, and industry days
- How to distill information from customer presentations and reports, information from end users, the opportunity background and history, and research
- Rules on how to gather information ethically to keep the company out of trouble

Module 5: How to Contribute to Win Strategy

- Understanding the components of win strategy
- How project personnel contribute to developing a win strategy
- How to win as an incumbent or how to beat an incumbent
- What are win themes
- How win themes can figure into your win strategy sessions, and how to change your win strategy into a list of cohesive action items

Module 6: Competitive Analysis for Project Personnel

- Avenues for the project personnel to identify competitors, gather competitive intelligence, and determine their strengths and weaknesses
- The types of action items project personnel could undertake to stay ahead of the competition

Module 7: Assisting in the Team Formation Process

- Basics of teaming:
  - Why team and when one should team
  - Forms of teaming
  - Teaming strategies
  - What to look for in a teaming partner
  - NDAs and Teaming Agreements
- How project personnel can help the BD organization with forming a formidable team

Module 8: Contributing to Solution Development

- Contributing effectively to the solution development, win strategy sessions, and other BD organization-driven workshops

Module 9: Summary and Recap

- Recapping the course
- Checking knowledge
- Discussing takeaways and questions

4   Foundations of Capture Management

Foundations of Capture Management training arms you with real knowledge and tools you will apply immediately to capturing government contracts and dramatically improving your win probability (Pwin). The chances of winning government contracts without capture planning are the same as cutting classes during a college semester and getting an A on the final exam. It's possible, but hope is not a great win strategy for a government contracting company (or any business). The government capture planning process starts after opportunity qualification and continues past proposal submission. Its goal is to position you to win before the government releases a Request for Proposal (RFP).

This class teaches how to master techniques for the six areas of capture: customer engagement, intelligence gathering, win strategy development, competitive analysis, teaming, and solution development. The course uses a real bid opportunity to practice all the capture steps in hands-on exercises using typical tools available to business developers and capture managers. Participants develop key elements of a capture plan using a capture plan template and brainstorm on win strategy using a case study.

This is an interactive two-day workshop that is 50% lecture, 40% exercises, and 10% discussion. It will teach you real skills to raise your win probability for the government contracts you pursue.

Upon course completion, the participants will have learned and be able to put into practice:

- Understanding where capture fits in the business development life cycle
- Identifying six types of decision makers and developing relationships with the customer
- Preparing customer profile and contact plan
- Collecting the opportunity intelligence in ethical ways and analyzing it for applicability to the capture effort
- Developing a capture plan
- Developing a win strategy and compelling win themes
- Identifying top competitors and performing competitive analysis
- Identifying and vetting potential teammates
- Postulating the requirements before RFP issuance
- Developing Concept of Operations (CONOPS) and solution sets for proposal sections
- Staging capture materials for proposal
- Preparing a proposal plan and capture schedule
- Organizing the capture team

Foundations of Capture Management Course Curriculum

Day 1 Highlights	
Module 1: Introduction	**Module 2: Customer Engagement**
• Introductions and learning objectives • Introduction to capture and overview of the capture process to offer you a big-picture perspective • Overview of the class project	• How to create relationships and customer contact plans with your Government customers • Four key tasks for interfacing and building relationships with Government customers • Understanding how your customer buys and using information to gain a competitive edge • How to identify six key types of Government buyers and buying influences • Customer contact plan for marketing, information gathering, and influencing • 20 questions for gathering information from the customer during a visit.

- **Exercise**: Identify customers and their key goals from business development inputs. Create a customer profile and draft contact plan.

Module 3: How to gather actionable intelligence – the best-informed wins

- Ethics of intelligence gathering and how to avoid legal repercussions that may cost you your business.
- How to collect intelligence during Government site visits, proposal conferences, and industry days.
- How to analyze opportunity history.
- Purposes and key components of a capture plan.
- How to develop a capture plan.
- **Exercise**: Development of a draft capture plan.

Module 4: How to develop a great win strategy and win themes to prepare you to finish on top

- Definition of a win strategy.
- How to develop a viable win strategy.
- How to devise top-level actions that create a winning offer.
- How win strategy is related to win themes.
- Three types of win themes.
- How to develop powerful proposal-level and section-level win themes that drive strategy.
- **Exercise**: Identify win strategies and action items.

Day 2 Highlights

Module 5: How to analyze your competition

- Techniques for identifying competitors and their likely strategies
- What information to collect on your competitors
- Where to find information on your competitors ethically
- Relationship between competitive analysis, teaming, and other aspects of capture
- **Exercise**: Identify top competitors and perform competitive analysis. Update capture plan

Module 6: Teaming

- How to choose and engage the right companies to create a team that compels the customer to select you
- How to decide when it is beneficial to team and when it is not
- Teaming strategies pros and cons
- How to decide between priming, subcontracting, joint venture, or a contractor teaming agreement (CTA)
- How to select and vet teammates
- **Exercise**: Identify teammates and update capture plan.

Module 7: How to develop the solution pre- and post– draft RFP that will wow your customer

- Overview of solution development
- Typical problems with solution development
- Concept of Operations (CONOPS) development techniques
- Developing solution sets for proposal sections
- Staging capture materials for proposal use
- Preparing a proposal plan
- **Exercise**: Develop a solution for a proposal segment and document in a capture plan

Module 8: How to manage your capture effort effectively while conserving your resources

- Sequence of capture steps and decision gates, and how they line up to the Government acquisition process
- How to develop an effective capture schedule that conserves your resources but enables you to prepare well
- How to organize your capture team
- **Exercise**: Develop a capture schedule

Module 9: Summary and Recap

- Recapping the course
- Checking knowledge
- Discussing takeaways and questions

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5 Advanced Capture Management

This training takes capture management to the next level, showing exactly what it takes to maximize win probability and mastermind the most effective win strategy. You'll learn techniques for conducting various forms of competitive analysis, including Black Hat sessions, win strategy workshops, and solution development (Concept of Operations (CONOPS)) brainstorming sessions, creating advantageous teaming arrangements, and much more.

This training also focuses on advanced techniques of sales and customer engagement to excite your government customers about receiving your proposal and award the contract to your company. It provides a list of resources for researching the background of bid opportunity, so that you find information and connect the dots like professional researchers.

OST's optimized capture process focuses on the six most important areas of capture that make a winning difference: customer engagement, intelligence gathering, win strategy development, competitive analysis, teaming, and solution development. This class shows the holistic view of how all these areas affect one another, versus a linear process, ensuring deeper understanding of how effective capture planning increases your Pwin. During the training, participants will brainstorm using a variety of case studies to learn the principles taught in the class.

This course is for those who have experience with capture management. It builds advanced skills by offering a deeper understanding of theory and practice of capture management. The course expands abilities through best practices-based methodologies and providing tool sets for immediate implementation.

The course also focuses on improving cost-efficiency and effectiveness of your capture team through better targeted activities. This class is an interactive two-day workshop that is 50% lecture, 30% exercises and case studies, and 20% discussion.

Upon course completion, the participants will have learned and be able to put into practice:

- Understanding how advanced capture techniques offer an edge in a competition.
- Building strong and lasting relationships with Government customers.
- Shaping opportunities and requirements.
- Gathering intelligence like professional analysts and distilling it to drive capture strategy and proposal development.
- Facilitating win strategy development sessions.
- Developing a solid value proposition.
- Turning advanced win strategies into action.
- Unseating incumbents and defending one's position as an incumbent.
- Using seven most useful competitive analysis techniques.
- Understanding Price to Win and competitive analysis for Multiple Award contracts.
- Facilitating Black Hat sessions that produce actionable intelligence.
- Applying strategic principles to teaming.
- Negotiating binding teaming agreement to protect bidder s' interests.
- Developing an executive summary, management, technical, risk, price strategy, past performance, resumes, staffing, and other approaches.
- Pre-staging of capture materials for proposal development.
- Focusing the capture effort and measuring its effectiveness.

Advanced Capture Management Course Curriculum

Day 1 Highlights

Module 1: Introduction

- Introductions and learning objectives
- Recap: overview of the capture process for an advanced big-picture perspective

Module 2: Creating Lasting Customer Relationships

- How to create strong and lasting relationships with Government customers
- Advanced techniques for building an effective rapport with Government customers
- Techniques for finding connections and engaging customers before and after the communication channels close
- How to influence the RFP and shape customer requirements.
- Organizing key information about the customer and measuring customer relationship
- Engaging decision-makers with a high level of influence.
- **Case Study**: Determine correct and incorrect courses of action as applicable to a real-life scenario

Module 3: Gathering Intelligence Like a Pro, Focusing Time and Effort on Information Needed to Win

- Differences between data, information, knowledge, and actionable intelligence
- Sources of information and degrees of their reliability
- Where to find the right information on the web and how to search for data like a professional analyst
- How to harvest valuable intelligence from customer artifacts
- How to distill information from open sources
- How to analyze the data to make the right capture-related conclusions
- Validating and testing data
- A system for documenting intelligence that's most useful for the proposal team
- **Exercise**: Research and analyze an opportunity based on the information provided

Module 4: Developing a Win Strategy that Packs a Punch Mastery in facilitating win strategy development sessions.

- Finer points of the win strategy development process
- Key components of a strategy
- Developing a value proposition
- How to test quality of the win strategy
- Types of successful win strategies
- Effective use of ghosting
- Strategy for unseating incumbents and defending one's position as an incumbent
- Taking your win strategies to the next level
- Win strategy white paper and its mapping to the action items and solution development
- Developing and tracking strategic action plans
- **Exercise**: Conduct a win strategy development session simulation

Day 2 Highlights

Module 5: Advanced Competitive Analysis to Exploit Competition's Shortfalls and Neutralize their Strengths

- Seven most used competitive analysis techniques and their practical application
- Applying intelligence gathering techniques to competitive analysis
- Competitive analysis for IDIQs with multiple bidders.
- Introduction to Price to Win analysis
- A practical approach to conducting a Black Hat session that produces actionable intelligence
- Turning competitive intelligence into strategic decisions and actions
- **Case Study**: Application of competitive analysis tools

Module 6: Teaming Strategies

- Strategic considerations that go into forming a team
- How to avoid diluting the scope and dealing with the risk of having too many teammates
- How to choose between exclusive and non-exclusive teaming
- Effective teaming techniques and precautions for teaming with competitors
- Understanding size rules and potential disqualifiers
- Elements of a binding teaming agreement
- How to negotiate for success
- Negotiation tactics and appropriate responses
- **Exercise**: Compare strategic teaming scenarios and determine the most appropriate paths of action

Module 7: Solution Development

- Developing executive summaries
- Developing solutions for management, risk management, and technical approaches
- Developing a price strategy
- Pre-staging of proposal materials
- **Exercise**: Prepare risk matrix. Walk through the solution development checklists

Module 9: Summary

- Additional resources and bibliography.
- Summary.
- Recap.

Module 8: Capture Process Management

- Conducting gate reviews focused on results and measurements.
- Metrics for capture effectiveness.
- **Discussion**: Technique applicability to participants' organizations.

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6   Competitive Analysis: Black Hat & Price to Win (PTW)

This training covers Black Hat and Price to Win (PTW) analyses that are the backbone of the competitive analysis and are indispensable in the highly competitive world of winning government proposals. Many companies forgo competitive analysis altogether and cannot set effective and deliberate pricing strategies. Many resort to guessing salaries and rates or blindly accepting target rates from a prime contractor, leaving them to face profitability and execution problems later. Since price is a core element of your offering and outdoing your competition in the technical solution is key to winning, much is lost before the competition even begins.

This course will help you master the techniques for performing bid opportunity-specific competitive analysis. Topics covered include identifying your competitors; performing ethical competitive analysis using publicly accessible sources; quantitative and qualitative questions to answer; organizing full-blown and reduced-size Black Hat sessions; collecting relevant information on competitors' approach; performing SWOT analysis; postulating competitors' win strategies; ranking competitors; developing the resulting win strategies and action items such as ghosting; understanding the tradeoff between the technical solution, best value, and price; following a disciplined PTW development process; leveraging data from various PTW information sources; pricing competitors' solutions; integrating competitive analysis with the pricing model; performing labor rate analysis; and applying strategies to win based on the whole offer, including the price.

Our Black Hat and Price to Win course will give you the real tools and skills you can apply immediately to positioning yourself to win against the competition, significantly raising your win probability (Pwin). This is an interactive two-day workshop that is 50% lecture, 40% exercises based on a real opportunity analysis, and 10% discussion.

Upon course completion, the participants will have learned and be able to put into practice:

- Understanding how to lay the groundwork for competitive analysis during the capture process
- Identifying three to five competitor teams and preparing for the Black Hat Analysis
- Organizing and conducting the Black Hat exercise
- Performing the competitive analysis before and during the Black Hat
- Using a variety of data sources to determine and correlate information about competitors
- Conducting SWOT analysis and postulating competitor win strategies

- Ranking competitors against the stated requirements and government customer hot buttons
- Developing a competitive analysis-based win strategy
- Understanding Price to Win principles and process
- Gathering information for the PTW effort using a variety of paid and free sources, including filing FOIA requests
- Performing the PTW analysis
- Performing the labor rate competitive analysis, including reverse-engineering competitors' wrap rates
- Developing pricing strategy based on the Price to Win

Competitive Analysis: Black Hat & Price to Win Curriculum

Day 1 Highlights

Module 1: Introduction

- Introductions and learning objectives
- Introduction to capture and overview of the capture process to offer you a big-picture perspective
- Overview of the case study

Module 2: Laying the Groundwork for Competitive Analysis in the Capture Process

- What if there is no competitive analysis and PTW?
- Competitive analysis elements
- Ethics of competitive intelligence and the information you cannot use by statute
- Four steps for developing a repository to collect knowledge on competitive intelligence
- Other competitive analysis tips

Module 3: Identifying the List of Competitors and Preparing for the Black Hat

- Techniques for determining the list of prime contractors
- Techniques for overcoming challenges in determining the teaming partners
- A typical Black Hat setup, agenda, and organization
- Determining government customer's hot buttons
- Analyzing the potential Source Selection Board members
- Competitive analysis process as a part of capture planning
- Developing the viable competitor profiles
- **Exercises**: Determine a competitor list for the case study; capture the viable competitor profiles

Module 4: Performing the Competitive Analysis

- Qualitative questions to answer about each competitor: the most useful capture information
- Competitor analysis: company information gathering
- Mining a variety of data sources for relevant competitive intelligence on government contractors
- Performing SWOT analysis
- Determining competitors' postulated win strategies
- Ranking competitors individually and as an aggregate competitive field analysis
- **Exercise**: Go through the competitive analysis steps and develop competitor rankings against the home team

Module 5: Developing a Competitive Analysis-Based Win Strategy

- Comparing competitors with the "home" team's win strategy
- Developing the resulting action items and win strategies applicable during your overall capture process
- **Exercise**: Devise the home team's win strategy based on the Black Hat results and determine the strategic action items

Day 2 Highlights

Module 6: Price to Win Principles and Process

- Why Price to Win?
- Understanding the tradeoff between value and price
- Understanding the best value continuum in government proposal evaluation
- PTW development process steps

Module 7: Gathering Information for the PTW Effort

- Mobilizing information sources for situational assessment of the PTW
- Determining the funding budget for the target contract
- Analyzing customer trends and behaviors and how this information impacts your PTW analysis decisions
- Analyzing your competitors' financial decisions and trends
- **Exercise**: Gather information to prepare for the PTW analysis

Module 8: Performing the PTW Analysis

- Identifying the price to compete
- Developing a solution based PTW

Module 9: Mastering the Labor Rate Analysis for Government Proposals

- The process for performing a labor rate analysis for government proposals

- Pricing competitors' solutions based on Black Hat findings and information gathered specifically for the PTW effort
- Pricing competitors' offerings per the RFP and competitors' postulated win strategies
- **Exercise**: Develop a solution for a proposal segment and document in a capture plan

- The process, tips, and tricks for matching labor categories.
- Determining the competitors' wrap rates
- When and how to use GSA rates as data points
- **Exercise**: Practice labor category matching and labor rate analysis

Module 10: The Next Steps for PTW: Developing Your Pricing Strategy

- Continuously updating the PTW model to iterate your solution
- Creating the win

Module 11: Summary and Recap

- Recapping the course
- Checking knowledge
- Discussing takeaways and questions

7   Proposal Theme Statements and Win Strategies

Theme statements show the government exactly why they should choose your proposal over your competitors' bids. This training teaches you how to write persuasive and memorable proposal theme statements that highlight your discriminators in terms of customer benefits. This course also teaches how to build a win strategy based around these themes to deliver a compelling proposal.

This training workshop teaches you to distill your sales pitch to the government into a handful of memorable, persuasive points known as proposal theme statements. These statements explain how your solution is better than your competitor's, whether you have a superior product, faster service, a lower price, or a less-risky plan. Theme statements form the backbone of your win strategy, and our hands-on workshop gives you an approach to discover the most effective themes for every proposal.

Our approach, based on best practices from the Association of Proposal Management Professionals (APMP), also offers you a roadmap to using themes at every stage of the capture, proposal, and proposal evaluation process. We emphasize that theme statements are primarily a function of capture management and should drive your win strategy, not the other way around.

The course walks you through the purpose of theme statements, their numerous types, and their three building blocks. We go beyond the basics to explain everything required to develop effective proposal theme statements that make your company stand out among other bidders. You will then acquire techniques and practice them in hands-on exercises to transform theme statements into win strategies to help increase your proposal's win probability (Pwin).

This workshop is 40% lecture, 50% exercises, and 10% discussion. Participants will learn how to masterfully facilitate win themes development sessions and will never have to struggle with creating the right win themes or win strategies.

Upon course completion, the participants will have learned and be able to put into practice:

- Understanding the goals and the characteristics of effective proposal win themes and customer messages during the capture process.
- Knowing the most useful types and categories of win themes for government capture and proposals.
- Recognizing and applying the building blocks of a successful win theme.
- Identifying government customer hot buttons necessary for win theme development.
- Using a three-session win theme development process.
- Refining and enhancing win themes.
- Deriving a capture win strategy and developing strategic actions from your win themes to increase your Pwin.
- Applying advanced win theme development concepts to influence government evaluators more effectively.
- Presenting win themes effectively in a proposal.
- Facilitating the win theme development process and applying its principles in course participants' organizations.

Proposal Theme Statement and Win Strategy: Curriculum

Highlights

Module 1: Introduction

- Introductions and learning objectives.
- The purpose of win themes.

Module 2: Defining Win Themes

- Typical problems with developing proposal win themes.
- Definition of proposal win themes.
- Rule of thumb for win themes.
- Variety of win theme forms and their examples.
- Characteristics of effective win themes that are most useful to winning your proposal.
- Three general categories of win themes.
- Discussion: Types and categories of win themes used in participants' proposals.

Module 3: The Anatomy of Proposal Win Themes

- Three building blocks of effective proposal win themes.
- Function of each building block and its identifying questions.
- Dissecting each of the win themes building blocks.
- Checklists and questions for defining the building blocks.
- Making your win themes believable.
- Real reasons why people have trouble identifying benefits.
- Identifying the customer's sweet spot.
- Techniques for disciplined construction of win themes.
- Examples of successful proposal win themes.
- Exercise: Identify each of the building blocks and their relevancy to the customer. Deconstruct a complex win theme.

Module 4: The Secret Sauce – Efficient and Effective Win Theme Development Process During the Capture Process

- Facilitating a win themes development session.
- Inputs into a win themes development: Brainstorming Session 1 structure.
- Outputs from win themes development: Brainstorming Session 1.
- How to automatically shift focus from you to the customer.
- Definition and types of government hot buttons.
- Techniques for identifying hot buttons for your government customers.
- Framework with a checklist for recognizing hot buttons.
- The secret sauce of win theme development: Brainstorming Session 2.
- Examples of win themes that highlight the principle of customer focus.
- Brainstorming Session 3: Weeding and refining win themes using a strategic approach.
- Facilitating Win Themes Brainstorming Session 3.
- Exercise: Identify customer's hot buttons. Apply next process steps to developing win themes. Refine and enhance your win theme.

Module 5: Transforming Win Themes into Win Strategies and Action Items as the Focus of Successful Capture Planning

- Win strategy development using win themes.
- Strategic actions development for successful capture planning.
- Types of strategic actions that increase your proposal Pwin.
- Discussion: Derive a capture win strategy and develop strategic actions from your win theme.

Module 6: Advanced Win Theme Concepts

- How to jump-start your proposal the right way by preparing for and reaching nine all-important proposal kickoff goals.

Module 7: Placing Win Themes in the Proposal

- Examples of how win themes should appear in a government proposal.

- Preparing proposal kickoff materials.
- Planning for the kickoff.
- Exercise: Go through the requirements for the draft Kickoff Brief for the practice proposal.

- Structure of a win theme in a focus box.
- Structure of a win theme in the text.
- Other instances of win themes.
- Exercise: Rephrase your win theme to present it in different forms in your proposal.

Module 8: Capture and Proposal Team Facilitation in Win Themes Development

- Capture and proposal team facilitation tips.
- Win theme development process application tips.
- Where win theme development fits in the capture and proposal process.
- Discussion: How participants will implement win themes development process in their organizations.

Module 9: Summary and Recap

- Additional resources and bibliography.
- Summary.
- Recap.

8   Foundations of Proposal Management

The Foundations of Proposal Management training course offers must-have skills in managing federal proposals. This course begins with the proposal process, which is based on current best practices (although it resonates with some of the elements of the Shipley process, it is mostly focused on agile principles and what it takes to win in the current environment of smaller geographically dispersed proposals teams, shorter deadlines, and limited proposal resources). It covers the proposal development process flow, starting with the government RFP analysis. It then proceeds to federal proposal writing planning (including using an alternative to storyboarding) and teaches how to develop an annotated outline and a proposal schedule.

The course also covers preparing for and conducting a proposal kickoff meeting to organize your team and managing proposal writing effectively to develop winning proposal section content. It delves into running proposal reviews (such as Pink Team, Red Team, Gold Team, White Glove, and others), and discusses proposal production and post-proposal activities, such as participating in the government proposal debrief. It is an interactive two-day workshop that is 50% lecture, 40% exercises, and 10% discussion. The people who will benefit from this proposal training are:

- Proposal managers who are new to government proposals. Those who transition from the commercial proposal world, and those who are just starting to get their arms around government proposal management as a profession.
- Proposal writers and coordinators who have written many proposals and received on-the-job training but would benefit from understanding the formal structure.
- Capture managers who would like to how capture efforts are communicated in proposals.
- Proposal managers and coordinators who want to work better, faster, and more efficiently, as well as learn how to win more government proposals.
- Those who received training years ago and want to refresh their skills and become proficient in the latest best practices.
- Those who are interested in a repeatable proposal process to enable them to avoid starting each proposal from scratch.

Upon course completion, the participants will have learned and be able to put into practice:

- Understanding where bid proposal management fits in the federal business development life cycle.
- Understanding what it takes to win government proposals.
- An understanding process-based approach to proposal management.
- Analyzing RFP requirements.
- Parsing the RFP to create a compliance matrix and compliance checklist.
- Creating storyboards and an annotated proposal outline.
- Developing a proposal schedule.
- Creating a realistic proposal process and proposal development plan

- Issuing assignments to proposal writers and subject matter experts.
- Integrating cost proposal activities with the technical proposal development.
- Preparing for and conducting a productive proposal kickoff meeting.
- Managing proposal process day-to-day.
- Conducting effective Pink Team, Red Team, and other types of proposal reviews.
- Producing and delivering a compliant proposal before the deadline.

Foundations of Proposal Management: Curriculum

Day 1 Highlights

Module 1: Introduction

- Introductions and learning objectives.
- Introduction: What is proposal management? Overview of the business development process to provide a big-picture perspective.

Module 2: Proposal Process

- Why most proposals don't win and what to do to win government proposals.
- OST's six-phase proposal process aligns with other industry practices such as the Shipley proposal process but dives into agile approaches to streamline and organize federal proposal writing.

Module 3: Requirements Analysis

- How federal RFPs are organized. The most important government RFP sections for a proposal manager. How to read government RFPs
- correctly to understand exactly what government evaluators are looking for in your proposal.
- How to develop an RFP compliance matrix, and compliance checklist to ensure that you don't miss any RFP requirements.
- Exercise: Analyze and parse the RFP to create a compliance checklist.

Module 4: Outlining and Storyboards

- How to create a compliant proposal outline that helps get the highest score.
- How to create an annotated outline for a proposal that provides detailed instructions to proposal writers.
- When to use annotated outlines as opposed to storyboards.
- How to develop storyboards or proposal writers' work packages that help transition easily from brainstorming to the first proposal draft.
- Exercise: Walkthrough a filled-out proposal storyboard and understand how its different elements help you plan a persuasive proposal section.

Module 5: Developing a Proposal Plan

- How to create a proposal schedule that will result in an error-free set of proposal documents.
- How to develop a realistic proposal development plan.
- How to develop a proposal organization structure with roles and responsibilities.
- Assigning proposal sections to authors.
- Exercise: Plan your proposal to develop a realistic proposal schedule.

Module 6: Conducting a Productive Proposal Kickoff Session

- How to jump-start your proposal the right way by preparing for and reaching nine all-important proposal kickoff goals.
- Preparing proposal kickoff materials.
- Planning for the kickoff.
- Exercise: Go through the requirements for the draft Kickoff Brief for the practice proposal.

Day 2 Highlights

Module 7: Managing the Proposal Day-to-Day

- How to manage a proposal team effectively on a daily basis.
- Issuing data calls to proposal team members.
- Tracking proposal section status.
- Managing proposal document workflow and configuration control.
- Tackling challenges of managing a virtual proposal team.
- Resources for getting non-professional writers to produce better proposal sections and graphics.
- Discussion: Day-to-day proposal management techniques.

Module 8: Conducting Effective Proposal Reviews

- How to run effective proposal reviews.
- Types of proposal reviews (Annotated Outline Review, Peer Review, Pink Team, Red Team, Read-Aloud Review, Gold Team, White Glove).
- Planning for and conducting a Pink Team review.
- Planning for and facilitating a Red Team review.
- Gold Team review standards.
- Other types of proposal reviews that may be helpful to your team.
- Proposal review templates, inputs, and outputs.
- Review recovery effort.

- Exercise: Review a government proposal section for compliance and content; score the section and prepare recommendations.

Module 9: Producing and Delivering the Proposal

- What you need to complete prior to proposal delivery to the government.
- How to determine production requirements.
- How to estimate the binder size.
- Proposal tabs, cover, spine, and back requirements.
- Communicating and collaborating with the proposal production team.
- How to polish, print, check, and deliver your proposal on time.
- Confirming delivery.
- Exercise: Develop a proposal production and delivery plan.

Module 10: Summary and Recap

9   Advanced Proposal Management

This Advanced Proposal Management training course is for those who have several years of experience with proposal management. It takes government proposal management to the next level, beyond the proposal process. This course covers fine-tuning the proposal team leadership and proposal content development skills indispensable for a senior proposal manager looking for higher win probability (Pwin).

This class covers the spectrum of the most important topics including preparing for a proposal effort and making a bid-no-bid decision, orchestrating a great proposal kickoff, driving subject matter experts to produce winning content, exhibiting superb leadership and team management skills, managing conflict, setting the right expectations, optimizing proposal team performance, getting the most from the proposal color reviews, and mitigating proposal risks at every stage to reduce stress and increase your proposal's Pwin. The course also focuses on measuring and improving cost-efficiency and effectiveness of the proposal team.

The course builds advanced skills by offering a deeper understanding of the theory and practice of proposal management, expanding abilities through best practices-based methodologies, and provides tool sets for immediate implementation. This course is an interactive two-day workshop that is 60% t lecture, 20% exercises and case studies, and 20% discussion.

The participants will learn and practice skills in:

- Understanding how to avoid proposal mistakes even mature companies make • Mastering tools and techniques for making a bid-no-bid decision.
- Determining whether an RFP is wired.
- Planning and managing proposal budget and resources.
- Conducting a highly effective proposal kickoff.
- Scaling the proposal process up and down for different size pursuits.
- Applying the techniques to produce the most compelling proposal content that makes a winning difference.
- Mastering rapid learning techniques in a new subject matter to provide ample guidance to subject matter experts who develop innovative solutions.
- Initiating and facilitating rapid solution and section development for every part of the proposal.

- Tracking volume and section progress and quality.
- Applying leadership and proposal team building techniques to achieve optimum performance from proposal contributors.
- Applying effective communication methods to the proposal team.
- Getting results from difficult proposal team members.
- Working effectively with remote participants.
- Getting the most useful inputs from the color reviews.
- Mastering techniques for quickly integrating reviewers' input into the proposal.
- Managing proposal risk.
- Applying metrics for proposal effectiveness.
- Conducting an effective lessons-learned session.
- Making use of personal and organizational proposal process optimization.

Advanced Proposal Management: Curriculum

Day 1 Highlights	
Module 1: Introduction	**Module 2: Preparing for the Proposal Effort**
- Introductions and learning objectives. - Recap: Overview of the proposal process from an advanced big-picture perspective.	- Top proposal mistakes even mature companies make, and how to avoid them. - Tools and techniques for making a bid-no-bid decision. - Tell-tale signs for when the RFP is wired.

- The most important and often missed step before initiating a proposal effort.
- How to plan for proposal resources to manage your team to the budget and ensure adequate resources for proper proposal quality.
- Typical failures and complications at the proposal preparation stage and how to navigate through them successfully. determine correct and incorrect courses of actions as applicable to a real-life scenario.
- **Exercise:** Develop a proposal resource plan.

Module 3: Orchestrating a Great Proposal Kickoff

- Psychology of a great proposal kickoff.
- Determining appropriate size and level of proposal kickoff.
- Scaling the proposal process up and down for pursuits of different sizes, including proposal teams with more than 50 participants.
- Tailoring proposal process to the specific pursuit.
- Planning just-in-time training sessions.
- Preparing the kickoff handouts for best communication and team integration.
- Advanced techniques for reaching the nine kickoff goals.
- Typical failures and complications at the kickoff stage and how to navigate through them successfully
- Case Study: Determine correct and incorrect courses of actions as applicable to a real-life scenario.

Module 4: Driving the Team to Produce Winning Content

- Rising beyond the administrative task of running the proposal process.
- Six steps to owning proposal content and making a winning difference.
- Techniques for becoming an expert at being an expert in any proposal's subject matter.
- Professional techniques for interviewing subject matter experts and capturing content effectively.
- How to provide ample direction and guidance to subject matter experts.
- Typical failures and complications at the content development stage and how to navigate through them successfully.
- **Exercise:** Practice rapid learning techniques and determine content quality.

Day 2 Highlights

Module 5: Overseeing the Development of Winning Volumes and Sections

- How to initiate and facilitate rapid solution and section development sessions.
- Paying attention to the cost volume – one of the most important parts of your bid.
- Managing simultaneous orals and proposal processes.
- Getting to the winning content: executive summary, management, technical, past performance, resumes, and other sections.
- Tracking volume and section progress and quality.
- Exercises: Compare proposal and non-proposal resume. Build an optimized past performance template.

Module 6: Proposal Leadership

- Advanced skills for leading a proposal team effectively on a daily basis.
- Team-building techniques.
- Key management skills that distinguish great proposal managers from the rest.
- Keeping the excitement, motivation, and momentum for your proposal team.
- Methods of effective communication with the proposal team.
- How to coach and train your proposal team.
- How to get results from difficult proposal team members.
- How to work effectively with remote participants.
- Mastering data calls.
- Typical failures and complications of proposal leadership, and how to successfully navigate through them.
- **Exercise:** Practice proposal team building techniques

Module 7: Getting the Most from the Proposal Color Review Teams

- Rules of thumb for selecting the right number and types of reviews.

Module 8: Improving Proposal Performance

- Troubleshooting your proposal development plan and proposal risk management.

- Setting the right tone for the review regardless of your company's review process.
- Preparing directions for reviewers.
- Various methods for conducting reviews and their suitability for your proposal.
- Techniques for quickly integrating reviewers' input into your proposal.
- How to get the most useful input from reviewers.
- Typical failures and complications as related to proposal color reviews, and how to successfully navigate through them.
- Discussion: Troubleshooting organizational review processes and identifying improvements.

- Navigating through difficult proposal interfaces.
- Facilitating smooth transition from capture to proposal team.
- Transitioning from story boards to draft.
- Scaling the proposal effort up and down depending on the natural life cycle.
- Effective management of proposal budget.
- Metrics for proposal effectiveness.
- Conducting an effective lessons learned session.
- Personal and organizational proposal process optimization.
- **Exercise:** Allocate resources based on the proposal life cycle and identify risk areas.

Module 9: Summary
- Additional resources and bibliography.
- Summary.
- Recap.

10   Writing Persuasive Government Proposals

This one-of-a-kind course shows how to develop compliant and highly persuasive proposal sections in at least half the time that it would normally take. This training covers detailed methods for outlining within the proposal sections to ensure they are fully compliant and responsive, brainstorming properly as a group and individually to develop proposal section content, infusing proper structure and flow into your proposal sections, and implementing the correct writing processes and proposal section planning techniques. This course teaches much more than compliance.

The class will explain the differences between good and bad proposal language and cover detailed self-editing techniques, including editing automation. You will learn how to write better and faster and overcome writer's block. You will improve proposal readability and will practice speed writing in class using tools many proposal writers don't know. You will learn the science of proposal persuasion through creating a mental picture in government evaluators' minds and telling different types of stories appropriate for proposals to make a dry proposal medium come alive and capture their imaginations.

You will acquire techniques and tools that will transform even the most reluctant non-professional writers into prolific and effective proposal writers. You will be able to bring this information to your company to provide just-in-time training to your Subject Matter Experts (SME) to produce better proposal sections, reducing the time you spend on rewriting proposals and reducing your stress.

This workshop is 40% lecture, 50% exercises, and 10% discussion. The workshop exercises will double your proposal writing speed and will drastically improve the quality of your proposal content by giving you more time to polish it. The results will be astounding, making technical writing easier, less time-consuming, and even enjoyable.

Upon course completion, the participants will have learned and be able to put into practice:

- Understanding the goals of proposal compliance and persuasion.
- Analyzing the RFP requirements applicable for your proposal section.
- Determining writing focus.
- Infusing persuasive argument structure.
- Annotating a proposal section.
- Shifting the unhelpful beliefs about proposal writing.
- Positively impacting proposal team's and individual performance psychology.
- Brainstorming and planning a section in a group and individually.

- Speed-writing proposal sections.
- Successfully managing writer's block.
- Understanding the elements of proposal persuasion and how to apply them effectively.
- Being able to develop at least one of the 11 types of proposal story.
- Applying four steps for developing a metaphor.
- Editing proposal section for content, structure, grammar, and spelling.
- Applying readability metrics to your proposal sections.

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Writing Persuasive Government Proposals: Curriculum

Day 1 Highlights

Module 1: Introduction

- Introductions and learning objectives.
- Importance of compliance and persuasion in proposal writing.
- Class roadmap.

Module 2: Detailed Outlining Within Sections

- Understanding compliance at the section level.
- How to analyze RFP requirements for proposal section.
- First steps of outlining proposal sections to be compliant and compelling.
- **Exercise:** Analyze the requirements for the practice section, determine section focus, and identify key components.

Module 3: Infusing Flow for Higher Persuasion

- Annotating proposal sections.
- Understanding proposal content flow for higher persuasion.
- Infusing proper proposal section flow to form a compelling argument.
- The 8Ws and their order.
- **Exercise:** Annotate a proposal section outline.

Module 4: Proposal Speed-Writing System

- Introducing the three elements of the proposal speed-writing system

Module 5: Overcoming Unhelpful Beliefs about Government Proposal Writing

- The psychology of performance.
- Questions to uncover self-limiting beliefs about writing.
- Myths and truths of government proposal writing.
- Seven techniques to resolve specific psychological hang-ups and overcome self-limiting beliefs.
- Where dealing with psychology fits in the proposal process.
- Discussion: Apply concepts learned in class to the unhelpful personal beliefs and discuss ways to overcome them.

Module 6: Stage 1 of the Correct Proposal Writing Process

- Correct writing process to write better and faster.
- Stage 1 of the correct writing process, and where it fits in the capture and proposal process.
- Intelligence gathering to answer the 8Ws.
- Three steps for successful group brainstorming.
- Helping your group become more creative in generating ideas.
- Tools and techniques for brainstorming individually and preparing to write.
- **Exercises:** Brainstorming in a group. Brainstorm individually and plan the actions.

Module 7: Stage 2 of the Correct Writing Process

- Stage 2 of the correct writing process.
- The main secret to writing government proposals fast and well.
- Writing rules.
- Speed-writing tools.
- Where Stage 2 fits in the capture and proposal process.
- **Exercise:** Speed-write the proposal section.

Module 8: Beating the Writer's Block

- Elements of proposal writing procrastination.
- Four categories of methods to break free from the writer's block and help your proposal team.
- How to manage writing time.
- Discussion: Methodologies participants will use to deal with their writer's block.

Day 2 Highlights

Module 9: The Dark Art of Proposal Persuasion

- The dark art of proposal persuasion.
- Proposal language: what sells.
- The anatomy of proposal persuasion.
- Understanding government evaluators' individual drivers.
- Proper structure of the argument for better proposal persuasion.

Module 10: Use of Story in Proposals

- How to use story that makes boring proposal writing come alive.
- Elements of a strong proposal story.
- Eleven story types appropriate in a government proposal.
- **Exercise:** Develop a story for the practice proposal section.

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- Discussion: Integrate the material learned in the module and apply to the specific customer situations.

Module 11: Harnessing the Power of Metaphor

- Types of metaphors.
- Metaphor rules.
- Four steps for building an effective metaphor appropriate for government proposals, and useful during the capture process.
- **Exercise:** Create a metaphor for the practice proposal section.

Module 12: Stage 3 of the Correct Writing Process

- Stage 3 of the correct proposal writing process.
- Where Stage 3 fits in the proposal process.
- OST's four-part proposal editing checklist.
- **Exercise:** Apply editing checklist parts 1 and 2 to the proposal section draft.

Module 13: Copy Editing and Editing Automation

- How to configure and apply proposal editing tools.
- Readability and its tools.
- How to avoid sentence bloaters and reduce wordiness.
- Enemies of clear proposal writing.
- Language that kills proposal persuasion.
- Configuring MS Word for editing.
- Writing efficiencies in MS Word.
- Additional editing tools and techniques for proposal editing automation.
- **Exercises:** Configure MS Word. Watch the editing demo. Apply editing checklist parts 3 and 4 to finalize the draft.

Module 14: Summary and Recap

- How It All Maps to the Proposal Process.
- Summary.
- Recap.

11   Winning Government Cost Proposals

This is a two-day course on developing a winning federal government cost volume. Most often, price is the most important part of writing proposals for government contracts as it differentiates you from competition that may be technically equal. It is especially true when the government uses Lowest Price Technically Acceptable (LPTA) evaluation criteria instead of Best Value. Even when it is a Best Value procurement, the lowest bidder receives the award. Most companies, however, miss the most important elements of process and deliverable for the cost volume. Take this course to maximize your government price proposal win probability. This government contract pricing training covers all aspects of winning cost volumes, and the course is for finance, capture, and proposal professionals who are just starting to delve into the intricacies of government pricing.

Cost volume development training starts with cost proposal literacy. It shows differences between cost, price, price strategy, and price to win—and delves into cost buildup elements such as fringe, overhead, G&A, and fee. It covers allowability, allocability, and reasonableness of government costs, and a slew of other important rules. It discusses cost proposal management during capture, including competitor price analysis and price to win fundamentals. It then dives into assumptions to set boundaries around cost, and techniques for bridging the gap between proposal manager leading the technical proposal team and those in your company who are pricing government contracts.

The second part of the class focuses on less practiced cost volume techniques such as developing a highly persuasive cost proposal narrative, developing basis of estimates (BOEs) and work breakdown structure (WBS), specific strategies for developing winning cost volumes while maximizing your profit and reducing risk given the specific contract type, refining your cost proposal, and more.

This course is composed of 50% lecture, 40% exercises, and 10% discussion.

The participants will learn and practice skills in:

- Understanding the basics and principles of creating a cost volume.
- Understanding how contract type influences government proposal pricing.
- Implementing proposal pricing strategies for best value versus lowest price technically acceptable proposals.
- Winning on price.
- Handling cost volumes if someone is not a numbers person.
- Understanding how cost proposal evaluation affects the development process.
- Influencing government evaluators to grade your cost volume most favorably.

- Developing a price-to-win (PTW) analysis that incorporates competitive analysis, program intelligence, and maximizes win probability (Pwin).
- Using your proposal resources most effectively on the cost volume.
- Applying tools of persuasion for the cost and business volume.
- Refining the cost volume for maximum polish and punch.
- Developing and collecting the best assumptions out there to put clear boundaries around your price proposal.
- Developing Work Breakdown Structures (WBS).
- Using Bases of Estimate (BOE) to ghost your competitors and discredit low-ballers who are seeking to buy their way into a government contract.

Winning Government Cost Proposals: Curriculum

Day 1 Highlights

Module 1: Cost Proposal Training for Non-Finance Professionals

- Roadmap to winning in cost volumes.
- Cost literacy – differences between cost, price, price strategy, and price to win.
- Cost and price components basics, and cost proposal examples.
- Example of pricing to build comfort of non-finance professionals with the cost volume.
- Contract cost principles and procedures.
- Cost accounting standards.
- Cost and pricing data.
- Contract types important to pricing.

Module 2: Important Details About Cost Proposal Evaluation that Impact Cost Proposal Development

- Cost proposal evaluation factors, including understanding the difference between pricing strategies for best value and lowest price technically acceptable evaluations.
- Evaluation criteria weighting to allocate proposal resources correctly.
- Understanding proposal evaluators to address their key concerns.
- Cost proposal evaluation process, and how adherence to the process figures into cost proposal preparation.
- Understanding evaluation intricacies.
- Why the Government doesn't end up evaluating the price you bid – and how to avoid the pesky plus-ups.

Module 3: Cost proposal Management During Capture

- Cost team's involvement during the capture process.
- Proposal manager's involvement into capture from the cost proposal perspective.
- Determining different options for a solution.
- Determining your price competitiveness.
- Exercise: perform price analysis using a case study.

Module 4: Price to Win (PTW) Development

- Price to Win (PTW) development process.
- Top-level flow to create the win.
- Questions the technical team can help answer for PTW.
- PTW information sources and their use.
- How to integrate competitive analysis with a pricing model.
- How to perform labor rate analysis.
- How to create the win using the PTW.
- Exercise: Apply strategies in the case study to arrive at the PTW

Module 5: Managing Cost Volume Development During the Proposal

- Resource planning for the proposal to resource your proposals to win, reduce stress, and establish better control over the proposal budget.
- Cost volume development process steps.
- Cost inputs into a Bid-No-Bid decision.
- How a proposal manager can facilitate the cost development process and work closely with the cost team.
- Cost volume manager's role.
- Immediate tasks for the proposal manager to oversee while managing the cost team at the proposal start.
- Cost team kickoff tasks checklist.

Module 6: How to Develop a Highly Persuasive Cost Proposal Narrative

- Best practices for how to write a cost proposal narrative.
- Cost proposal narrative content.
- How to use graphics to depict key pricing themes and discriminators.
- How to write a persuasive cost volume executive summary.
- Exercise: develop a cost proposal template for a compliant and compelling cost volume.

Day 2 Highlights

Module 7: Cost Volume Refinement Techniques

- Ensuring that cost volume and technical volume agree.
- Strategies and techniques to tweak the technical and management solutions to bring down costs and achieve your price to win.

Module 8: Developing the All-Important Assumptions for Better Price Optics and Modifications After Proposal Award

- How to develop and collect assumptions and proposal basis that help increase cost-competitiveness.
- Usual assumptions.
- Additional assumptions that help with price optics.

Module 9: How to Develop a Work Breakdown Structure (WBS) for Better Proposal and Cost Controls After Award

- How to develop the Work Breakdown Structure (WBS).
- PWBS and CWBS.
- Considerations in CWBS development.
- How to scrub the CWBS.
- Relationship between CWBS and cost accounts.
- How to develop a WBS Dictionary.
- Exercise: Construct a WBS for the contract.

Module 10: How to Develop Basis of Estimate (BOE) to Ghost Competition and Provide Greater Confidence to the Customer in Your Cost Proposal

- Developing the dreaded BOEs that are perfect for ghosting low-ballers.
- Pros and cons of estimating methods such as analogy, crosschecks, parametric, and the detailed engineering bottom-up method.
- BOE template.

Module 11: Price strategies to Win in the Price Portion of Your Cost Proposal

- How to sharpen the pencils and apply price strategies appropriate for different contract types.
- Price strategies for cost-type, fixed price, and other contracts.
- How to win in LPTA competitions.

Module 12: Final Tips on Winning in the Cost Volume

- Cost volume reviews.
- Final tips on how to not be intimidated by cost proposals even if you are not a numbers person.

Module 13: Summary and Recap

- Summary.
- Recap.

12   How to Develop a Compliant Proposal

A compliant and high-scoring proposal starts with a well-thought-out outline. A great outline reduces stress and rework during the proposal development process. It helps direct the authors and integrate the proposal from the start.

This course dives into the intricacies of developing proposal outlines, annotating these outlines, preparing compliance and cross-reference matrixes, and preparing storyboards or work packages the right way. It starts with analyzing different types of Requests for Proposal (RFP) and Requests for Quote (RFQ) formats to show how various customers may organize the requirements. The course subsequently delves into when use of storyboards (or writers' work packages) is more appropriate than annotated outlines, and vice versa. It shows how to develop storyboards the right way, avoiding the typical problems companies face with storyboard development.

This course is for those in the Proposal Management, Proposal Writing, and Proposal Coordination fields. It will teach professional skills in annotated outlines and storyboard development. In the course, attendants will explore the outlining topic in a greater depth than in our Foundations of Proposal Management and Writing Persuasive Federal Proposals courses. It addresses the typical areas of struggle for proposal practitioners through individual and group work in a "roll-up-your-sleeves and put the new skills to practice" workshop format. The course zooms in on the nuance of outline and storyboard building that's a hallmark of true proposal professionals.

This interactive two-day workshop is 20% lecture, 70% practical exercises, and 10% discussion.

Upon course completion, the participants will have learned and be able to put into practice:

- Understanding how properly annotated outlines help reduce stress in proposals and get a higher score with evaluators
- Navigating different types of RFX structures like a professional
- Mastering the techniques for structuring proposal outlines correctly
- Setting up compliance matrixes
- Developing cross-reference matrixes
- Developing compliance checklists
- Allocating the page count correctly
- Developing effective resumes and past performance templates
- Setting up outlines for business and cost volumes

- Creating useful annotations to guide the authors
- Incorporating proposal mock-up elements into the outline
- Incorporating section flow into the outline
- Reviewing and refining the outline
- Issuing assignments to the authors using an annotated outline
- Navigating through the pros and cons of working with storyboards and writers' work packages
- Deciding when to use storyboards
- Setting up the storyboards correctly for the writers to eliminate typical storyboard breakdowns

How to Develop a Compliant Proposal: Curriculum

Day 1 Highlights

Module 1: Introduction

- Introductions and learning objectives
- Overview of where outlining and storyboarding fit within the proposal process
- How annotated outlines help reduce stress in proposals and get a higher score with evaluators

Module 2: Navigating RFPs and RFQs

- How to read an RFP or RFQ
- Different types of RFX structures (including Task Order RFPs), and how to navigate them successfully
- How to decide what sections are important for compliant outlining and what sections are part of a contractual document and therefore don't require proposal mention.
- **Exercise:** Identify sections pertinent to outlining in different types of RFPs and RFQs.

Module 3: Structuring Proposal Outlines

- Techniques for structuring proposal outlines correctly Sources of information and degrees of their reliability.
- Proposal outlines hierarchy
- Telling a story while remaining compliant
- Deciding on the outline structure
- Allocating page counts correctly
- **Exercise:** Decide on the top-level outline structure for a practice proposal.

Module 4: Ensuring Compliance

- The difference between compliance matrixes, cross-reference matrixes, and compliance checklists, and how to use each one correctly
- Other techniques for showing compliance in a proposal document
- How to set up a compliance matrix
- How to develop a cross-reference matrix
- How to develop a compliance checklist
- **Exercise:** Develop a cross-reference matrix for the practice proposal.

Day 2 Highlights

Module 5: Developing Resume and Past Performance Templates and Other Volumes

- How to develop effective resume templates
- How to design compliant and compelling past performance templates
- Setting up outlines for business volume
- Setting up outlines for the cost volume
- **Exercise:** Set up a past performance template, resume template, and business volume outline for the practice proposal.

Module 6: Transforming the Topical Proposal Outline into an Annotated Outline

- Creating useful annotations to guide the authors
- Incorporating proposal mock-up elements into the outline
- Incorporating section flow into the outline
- Reviewing and refining the outline
- Issuing assignments to the authors using an annotated outline
- **Exercise:** Annotate the practice proposal outline.

Module 7: Creating Proposal Storyboards and Work Packages

- The pros and cons of working with storyboards and writers' work packages
- Deciding when to use storyboards
- Setting up the storyboards correctly for the writers to eliminate typical storyboard breakdowns
- **Exercise:** Create a writer's work package for the practice proposal.

Module 8: Summary and Recap

- Summary.
- Recap.

13   Proposal Graphics Conceptualization and Design Workshop

It is impossible to imagine modern sales and marketing without visual elements—and proposals are no different. Graphics serve as one of the most important proposal persuasion elements. This course provides the skills necessary to develop a concept for a proposal graphic that conveys your solution in a customer-centric way to contribute to the persuasive power of your proposal.

This class will also show you how to ensure that your graphics have a professional look and feel, including graphics templates and design principles. All the skills taught in this class are specific to government proposals, which may be different from the traditional graphics design principles.

In addition to brainstorming on a graphic idea, this course also shows you how to design an action caption, sketch a graphic concept, determine how to deliver a specific visual message to the government customer, and use professional graphic design principles and resources to make your proposal graphics look attractive.

Professional proposal graphics artists are not the only ones who need to learn how to conceptualize and design persuasive proposal graphics. It also happens to be an indispensable skill for capture managers, proposal managers, and proposal writers.

Desktop publishers and even editors will benefit greatly from this proposal graphics training, expanding their professional range and earning potential. This course will also help those who in the small government contracting businesses who not have the luxury of working with a professional graphic artist and have to design graphics on their own.

This course is 40% lecture, 50% practice, and 10% discussion. You will learn the entire process of creating visuals for your solution, from managing the graphics process to conceptualizing and designing large, graphics-intensive items like cover pages and spines.

The participants will learn and practice skills in:

- Choosing the right type of visual to represent your information
- Planning space for graphics and visuals in the document
- Allocating resources to account for graphic conceptualization, creation, and rendering
- Conceptualizing infographics and customer-centric representations of your solution
- Using basic design principles to create attractive graphics
- Finding and using graphics templates and stock art
- Developing powerful action captions to increase persuasiveness of the graphics
- Creating large, graphic-intensive proposal elements such as covers and spines
- Editing graphics to ensure a professional finish
- Inserting and calling out a graphic in the proposal.

Proposal Graphics Conceptualization and Design Workshop: Curriculum

Day 1 Highlights

Module 1: Introduction
- Introductions and learning objectives
- Introduction to graphics and their importance in a proposal

Module 2: Preparing for Graphics Development
- Types of visuals in the proposal
- Ideal proportion of graphics and text
- Resource planning for graphics development
- Graphics management process in a large, graphics-intensive proposal
- Rules and free resources for setting up a customer-centric graphics template and palette
- Establishing graphics sizes and mockups
- **Exercise:** Select a graphics template and palette for the proposal.

Module 3: Easy Principles of Graphics Conceptualization
- Three steps to conceptualizing graphics
- Unlocking the creative process
- Sources of inspiration and ideas
- Types of graphic representation, including an infographic representing your entire solution
- Developing customer-focused, persuasive action captions
- Determining the purpose for the graphic
- **Exercise:** Apply three steps to conceptualize a graphic and its action caption.

Module 4: Designing the Graphics
- Seven cardinal graphics rules
- Four design methods for creating graphics
- Sources of graphics templates and stock art
- How to select and apply graphics templates and stock art to ensure professional results
- Graphics tools and their capabilities and benefits
- Using PowerPoint and other commonly available tools to render professional graphics
- Basic design techniques and shortcuts in PowerPoint
- **Exercise:** Create the first draft of the conceptualized graphic using the available resources.

Module 5: Finishing Touches
- Design principles such as alignment, proportion, and balance
- Editing your graphics to create a professional look and feel
- Designing vignettes, pull-quotes, focus boxes, tables, and other visuals
- **Exercise:** Apply finishing touches to a graphic.

Module 6: Creating Covers and Spines
- Setting up covers
- Preparing cover text
- Selecting photos and images for covers
- Designing spines
- Designing CD covers
- Printing and applying CD covers
- **Exercise:** Design a proposal cover.

Module 7: Graphics in the Proposal Document
- Preparing the graphics for insertion in the proposal
- Graphics file types and sizes
- Placing graphics on the page
- Rules for referencing graphics in the proposal
- **Exercise:** Insert a graphic and its action caption in the proposal.

Module 8: Summary and Recap
- Summary.
- Recap.

14 Desktop Publishing for Proposal Professionals (Microsoft Word)

This proposal desktop publishing (DTP) training for government proposals teaches valuable skills in designing, formatting, and publishing proposals in MS Word—presenting your company's offer in the most professional light to the proposal evaluators. The course begins with a foundation in the tools and features MS Word offers to the desktop publisher, and shortcuts to increase speed and efficiency. The course advances into the selection of color palette and styles, tables of contents, headers and footers, and elements of design to ensure your document is attractive. It culminates in teaching how to publish the document and prepare it for delivery.

In addition to proposal desktop publishing basics and essential MS Word skills, this course addresses stabilization within documents while multiple authors contribute to proposal sections using different formatting styles, and design principles to make your proposals look more attractive.

This workshop will provide practice files as we work our way through the building of a proposal volume. This workshop is 30% lecture, 60% exercises, and 10% discussion. It will demonstrate how to design and assemble proposal documents to help your company win.

The participants will learn and practice skills in:

- Applying MS Word shortcuts to optimize and accelerate the desktop publishing process.
- Create a color palette and design a compliant layout utilizing logos and other graphic media reinforcing your company's brand.
- Developing a proposal template.
- Setting up and creating styles that are easy for contributors to apply.
- Cleaning up the document to ensure multiple authors' styles do not destabilize the document.
- Understanding cut, copy, past, and paintbrush options efficiently.
- Using the Section and Page Break features and understanding how they affect headers, footers, and outlining features.

- Working with tables to convey information efficiently.
- Inserting material from MS Excel, PowerPoint, Project, Adobe Acrobat, Illustrator, Photoshop, and other types of files.
- Establishing an automated and hyper-linked Table of Contents (TOC) anywhere in the document, including several TOCs in the same document.
- Creating other lists such as List of Figures, Compliance Matrix, Acronym List, and Index
- Paginating the main page and sub-pages.
- Preparing the document for submission.

Desktop Publishing for Proposal Professionals: Curriculum

Day 1 Highlights	
Module 1: Introduction to Government Proposal Desktop Publishing	**Module 2: Preparing for Graphics Development**
- Introduction and learning objectives - Familiarization with what is possible in desktop publishing - Tips, Tricks, and Shortcuts - Moving through the document, split screen, and three ways to accomplish the same function	- Choosing a color palette - Comprehension and incorporation of the Solicitation Requirements - Styles: o What is Normal

- Toolbars and Rulers
- Moving the Quick Access Toolbar
- Populating Quick Access Toolbar with your favorite tools

- o How does Normal affect styles
- o Creating and editing styles
- o Import styles into another or a new document
- o Displaying styles so other users can apply them
- o Cleaning up styles
- o Column Breaks
- o Page Breaks
- o Section Breaks

Module 3: Editing the Document

- Table of Contents (TOC)—Part 1
- Create your own based on your styles
- Cut, Copy, Paste—Paintbrush
- Using the Clipboard icon
- Inserting text from another document
- Inserting from Excel, PowerPoint and Adobe products
- Tables
- Sorting in a table
- Formatting a table with styles
- Create a table style
- Preparing your graphics for insertion and inserting them into the document
- Keeping graphics from "jumping"
- Table of Contents (TOC)—Part 2
- Inserting "context specific" TOCs in one document
- Creating other lists: List of Figures, Compliance Matrix, Acronym List, and Index

Module 4: Publishing and Distribution Tips

- Printing and binding
- White Glove page check
- Keeping the exact copy or proof copy for your company (CYA)
- Preparing box label and receipt
- Handling the receipt after the signature, attaching it to and archiving the Proof Copy, scanning, and making it a part of the electronic files
- Creating PDF for uploading
- Checking each page for legibility, errors, misprints, or degradation of graphics
- CD, thumb drive or other electronic submissions files checks
- Distribution List
- Create file list all parties print and keep with Proof Copy
- Copying of all electronic files onto storage media, including the "archive" or "old" versions, and the "raw" graphics

Module 5: Summary and Recap

- Summary and recap
- Additional resources

15 Preparing & Winning Multiple Award & Task Order Proposals

This training course shows you how to win the right multiple award indefinite delivery vehicles (IDV) and win task orders on those vehicles. Today, the name of the game in winning government contracts is getting the right portfolio of IDVs. This is how the government prefers to get companies under contract.

Multiple award IDVs (that include Indefinite Delivery Indefinite Quantity (IDIQ) contracts, GSA schedules, BPAs, and various ordering agreements) are awarded to limited groups of government contractors that bid against each other for task orders (also called delivery orders, call orders, and so on). Once awarded, IDVs enable companies to grow quickly because they can win task orders within weeks, as opposed to winning single-award contracts that may take months or years.

According to Bloomberg Government analysts, here are some multiple award indefinite delivery contracts facts to consider:

- Federal Government prefers IDVs. Total IDIQ spending has been steadily increasing despite a decrease in total procurement spending. The law requires all contracts with a potential value of at least $100 million to be awarded through IDIQs. In other words, more work is going to be awarded under IDVs, and if you don't hold the right contract, you won't able to compete for the perfect contracts for your company.
- Only about 3,600 companies out of hundreds of thousands of Government contractors participate in non-schedule IDVs, and this number has stayed flat in the past few years. This means that all the money goes to a small fraction of companies who are in the know. Isn't it the time to join their ranks or even dominate that relatively small pool?
- Agencies keep selecting the same companies while they increase the number of competitors on their IDVs. It means that the companies who have learned "the system" for winning on these vehicles will continue winning and growing their IDIQ footprint. Until you understand how they do it, you won't be able to catch up—which is why you should take this course.

This training will show you how to win IDIQs against dozens, if not hundreds, of competitors, including preparing a competitive price proposal. This class will also teach you to win task order proposals. Proposal deadlines and page counts keep shrinking while competition gets even tougher, making it harder to win proposals even when you are the most qualified bidder. Responses barely make the deadline because proposal managers learn about many task order requests for proposal only as they are released. We will show you a way to maximize your task order win rate.

The class is 60% lecture, 30% discussion, and 10% exercises. This course will provide a recipe book for winning multiple award contracts and turning them from expensive boondoggles into a force multiplier.

The participants will learn and practice skills in:

- Understand the IDIQ trends in Government procurement.
- Determining what IDIQ portfolio a company should have considering its core competencies and target agencies.
- Qualifying an IDIQ for fit and conducting a capture effort to best position to win an IDIQ contract.
- Contributing to an IDV win not only as a prime but also as a subcontractor.
- Developing the IDIQ proposal content with the right answers to win the competition.
- Applying the IDIQ pricing strategies.
- Understanding why many companies fail to compete effectively and make good money on an IDIQ.
- Cracking the "code" of an IDIQ to determine task order patterns and win strategies.
- Positioning the right resources to help write persuasive and compliant task order proposals.

- Adding more face value as a proposal manager on fast-turnaround task order pursuits.
- Running mini-capture and creating an IDIQ specific Customer Map.
- Establishing an infrastructure and environment necessary to maximize the task order win rate.
- Developing an IDIQ-specific process for winning task orders.
- Developing a reusable toolset for implementing a task order process.
- Enacting a comprehensive marketing plan for the IDIQ.
- Getting the entire company involved in winning more task orders.
- Building a proposal library for winning fast turnaround task orders.
- Preparing a concise text and information-packed graphics to convey your competitive advantages in an extremely page-limited proposal format.

Preparing & Winning Multiple Award & Task Order Proposals: Curriculum

Day 1 Highlights *Module 1: Introduction and Learning Objectives*	*Module 2: Understanding IDIQs and Defining Your Company's MAC Needs*
- IDV foundations- what are the vehicles and how can a company make money on an IDIQ. - IDV benefits and trends in Government procurement.	- Why the Government likes IDIQs. - The types of IDIQs. - Navigating through IDIQ terminology. - How different IDIQs work and what it means for your business development efforts. - Top 20 IDIQs. - Products and services the Government buys through non-schedule IDVs. - Top agencies that spent money on IDVs. - The differences between IDIQs and requirements proposals. - Problems with leveraging IDIQs. - Techniques to determine what specific IDIQs your company needs. - **Exercise:** Determine what IDVs a company needs to have in its portfolio.
Module 3: Preparing to Win an IDIQ	*Module 4: Developing a Solution and a Winning Proposal for a MAC*
- Gathering key information you need to know about an IDIQ to determine whether it is a fit. - Determining proposal preparation details for solution development and resource planning. - Conducting an IDIQ capture effort, including customer engagement, intelligence gathering, win strategy analysis,	- Developing management, technical, past performance, and other solutions. - Planning for the proposal. - Establishing proposal security given the "incestuous" teaming and non-exclusive subcontractors, while gaining maximum benefit from team's knowledge.

IDIQ-specific competitive analysis, teaming, and solution development.
- **Exercise:** Perform a competitive analysis for an IDIQ with multiple competitors.

- Special considerations for multiple award contract proposal reviews.
- Proposal management best practices for winning IDIQs.
- Techniques for running an effective virtual proposal with multiple teaming partners.
- How to support proposals when you are a subcontractor and not the prime.
- **Discussion:** What best practices have the participants followed in preparing an IDIQ proposal?

Module 5: Winning IDIQs Through Content

- Mastering the elements that are common from an IDIQ to IDIQ.
- How to address the common proposal solution elements correctly to meet and exceed Government evaluators' expectations.
- IDIQ pricing strategies.
- **Discussion:** What IDIQ pricing strategies do participants find most applicable to their scenarios?

Module 6: The Secrets of Making Money on Multiple Award Contracts

- The only way to make money on a multiple award IDIQs.
- The reason why the number of companies winning IDIQs and task orders grows.
- The secret of how to start "cracking the code" of your IDIQ.
- How to determine task order patterns.
- How to position to win the majority of task orders.
- **Exercise:** Identify patterns for a specific IDIQ.

Day 2 Highlights

Module 7: Organizing to Prepare Winning Task and Delivery Orders

- Characteristics of a task order request for proposal.
- How task orders differ in format even on the same IDIQ.
- Personnel roles and internal and external resources necessary to win task orders.
- What atypical proposal role is in fast deadline and page-limited task order proposals.
- Training necessary for your resources to maximize effectiveness and efficiency in preparing winning task order proposals.
- **Exercise:** Given a company-specific scenario and resource constraints, determine the best path of action to establish a high-functioning task order shop

Module 8: Establishing an Infrastructure and Environment Necessary to Maximize Your Task Order Win Rate

- The tools you will need to develop a task order winning machine.
- The resources required to prepare proposals more efficiently and effectively.
- Developing a Task Order Manual to keep the team on the same page.
- Determining the marketing rules of engagement for your IDIQ team.
- Defining a unified customer message.
- **Exercise:** Determine marketing rules of engagement for a specific scenario.

Module 9: Developing an IDIQ-Specific Process for Winning Task Orders

- Tailoring the process to the specific IDIQ procurement processes.
- Techniques for developing a streamlined task order process.
- Example of a task order process.
- Conducting a mini-capture for task orders.
- Creating a Customer Map.
- Influencing the requirements during task order capture.
- Developing and enacting an integrated marketing plan for the IDIQ.
- Developing a reusable toolset for implementing your task order process.
- **Discussion:** What processes do the participants organizations need to implement or optimize?

Module 10: Developing the Task Order Engine to Ensure Wins

- Setting up and tracking task order details in a pipeline.
- Tracking customer-specific information important in task order wins.
- Techniques for setting up an IDIQ-centered proposal library and developing reusable materials.
- Types of proposal collateral to keep in the library.
- Involving operations personnel in increasing your task order win rate.
- **Discussion:** What are the actions your organization will take to increase your task order win rate?

Module 11: Secrets of Preparing Winning Task Order Proposals

- The biggest value proposal managers can add to running fast turnaround proposals.
- Examples and characteristics of text specific to task order proposals.
- Examples of info graphics used in winning task order proposals.
- Rules for developing task order pricing.
- Additional resource recommendations.
- **Exercise:** Edit text as appropriate for a page limited task order.

Module 12: Summary and Recap

- Summary and recap
- Additional resources

16   Proposal Editing Workshop

Your proposal must look polished and professional if you want to make a positive impression on evaluators. This class teaches the editing skills required to perfect your proposal for the government customer. Unlike regular editing, however, proposal editing requires skills that normally take a long time to master by trial and error unless you take this course.

This class covers everything from developing the professional attributes of a proposal editor, to estimating your workload correctly given tight deadlines and last-minute submissions, figuring out the optimum workflow, integrating changes, and adding value to the content you've edited through incorporating compelling language. It will help proposal editors remove irrelevancies and puffed-up text, give your proposals a single voice, detect showstopper mistakes, translate ugly "proposalese" and "technicalese" to proper English, and enforce consistent proposal style.

You will learn how to work with subject matter experts (SME) and edit their content to meet proposal requirements. You will practice editing for clarity and meaning, sharpen your ability to spot factual errors and redundancies, and organize unfocused materials.

You will also learn how to infuse a consistent voice throughout your proposal regardless of the number of authors involved. This course is not another English grammar class. This hands-on workshop is filled with examples and exercises that will help you master the techniques for rapid and accurate editing using commonly available tools and professional editing applications.

This interactive two-day workshop is 40% lecture, 50% exercises, and 10% discussion. It will teach you the real skills required to increase quality, professional appearance, and persuasiveness of your proposals.

Upon course completion, the participants will have learned and be able to put into practice:

- Understanding a proposal editor's role and key attributes.
- Understanding compliance.
- Assessing material and estimating resources required to edit sections.
- Optimizing editing time and workflow in a team of editors to save resources.
- Using electronic editing tools and professional hard copy markings.
- Avoiding typical editing traps and mastering editing techniques to ensure a perfectly clean copy.
- Editing for content while preserving author's meaning.
- Editing content for clarity, compliance, customer language, accuracy, and persuasiveness.
- Improving the substance of the proposal.
- Reducing page count without sacrificing content.
- Adhering to the requirements of the Plain English Act.
- Automating proposal editing to increase efficiency.
- Editing resumes and past performance for length and compelling, relevant language.
- Catching showstopper mistakes.
- Improving readability while satisfying technical evaluators.
- Effective workflow tracking.

Proposal Editing Workshop: Curriculum

Day 1 Highlights

Module 1: What it Takes to Be a Stellar Proposal Editor

- Introductions and learning objectives.
- The proposal editor's role in the proposal life cycle.
- Attributes of a great proposal editor.
- Mastering diplomacy, providing constructive feedback, and fostering teamwork.
- How an editor can have the greatest impact on proposal quality.

Module 2: Setting Up for Success

- Introduction to styles: working with GPO, Chicago, and other style guides.
- Checking what style is used for the proposal.
- Creating a proposal-specific style guide for the proposal team.
- Understanding compliance – how to quickly grasp the structure of the solicitation.
- **Exercise:** Customizing style guide template for your proposal team.

Module 3: Estimating Your Effort and Time

- Identifying different levels of editing.
- Assessing the material for content, organization, and writing style.
- Skills and effort that different levels of editing require from a proposal editor.
- Estimating time and effort required to edit the assigned workload.
- Optimizing editing time to save resources while achieving the most professional results.
- Determining workflow when working in a team of editors.
- **Exercise:** Estimate the time required to edit the assignment and plan your work.

Module 4: Editing Mechanics

- Using MS Word's Track Changes and Compare Documents tools effectively.
- Developing a systematic approach to electronic editing.
- Tracking and merging changes by multiple reviewers.
- Editing electronic section copy: secrets to clean and clear editorial feedback.
- Editing hard copy: professional editorial markings glossary.
- Microsoft Word shortcuts for increased speed and efficiency.
- Typical editing traps and how to avoid them.
- Four additional editing techniques to ensure a perfectly clean editing copy.
- **Exercise:** Practice and compare the application of two different techniques to demonstrate a difference in editing quality.

Module 5: Substantive Editing

- Maximizing clarity and compliance with the outline and RFP.
- Reintroducing RFP and customer's language.
- Identifying and eliminating irrelevant boilerplate.
- How to avoid distorting author's meaning.
- Flagging inconsistencies, incomplete information, and ambiguity.
- Adding benefits and proof language to improve persuasive qualities of the proposal.
- Translating "technicalese" to English: correcting imprecise wording, technical arrogance and lecturing, redundancy, garbled language, confusing thoughts, unknown acronyms, and incomplete information.
- Spotting and correcting factual inaccuracies that could kill your section's rating.
- Pinpointing areas that need work.
- Revising or reorienting figures and tables.
- **Exercise:** Edit section for content.

Module 6: Structural Editing

- How to cut down the text length to fit within the assigned page limit without sacrificing content.
- Editing for better section flow.
- Restructuring for more persuasive and proportionate paragraph flow.
- Revising introductory sentences.
- Organizing unfocused material.
- Revising for consistent voice even if multiple writers contributed to proposal development.
- Properly introducing figures and tables.
- **Exercise:** Edit section for length and structure.

Module 7: Copy Editing and Proofreading

- Plain English Act's impact on proposal writing and editing.
- Four editing automation techniques to increase editing speed and leverage modern editing tools.
- Using spelling and grammar tools effectively.
- Making global changes and using Find and Replace effectively.
- Techniques to improve proposal readability while satisfying technical evaluators.
- Eliminating passive voice or deciding whether and when passive voice is appropriate.
- Identifying vague, redundant, or overused words or expressions.
- Grammar gaffes every proposal editor should heed.
- Grammar and punctuation refresher for the most common proposal errors.
- Making finer adjustments such as tone and rhythm.
- Editing, titling, and captioning figures and tables for maximum impact.
- Ensuring consistency in style for every occurrence.
- **Exercise:** Copy-edit the section for sentences and words.

Module 8: Editing Resumes and Past Performance Sections

- Rules for cutting proposal resumes to the right page count.
- Editing past performance sections for compliance, relevancy, length, and consistency.
- Workflow tracking tools to ensure you are always organized.
- Working with authors to provide the missing information.
- **Exercise:** Edit a set of resumes.

Module 9: Module 9: Last Touches

- Ten items to check in a proposal for consistency and professional appearance.
- What to look for when editing for aesthetics to catch desktop publishing errors.
- Techniques for finalizing the copy.
- Comparing hard copy edits to the final document to ensure all changes are made correctly and no new errors are introduced.
- Generating an acronyms table using tools.
- Checking on numbering for figures and tables, and cross-references.
- Cleaning up style sheets for fast and reliable formatting.
- Generating or updating the table of contents.
- **Exercise:** Identify the items requiring correction prior to proposal production.

Module 10: Recap and Summary

- Summary
- Recap