OST GLOBAL SOLUTIONS

OST Training Catalog

B&P ACADEMY

Table of Contents

1 About OST

OST Global Solutions was founded in 2005 by Olessia Smotrova, and we have won over $27 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 by applying our five core values, which deliver repeatable success for our clients:

1. **Engage with Content:** OST consultants learn what our clients do and dive into the details. 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. We 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 with their most important pursuits. Our consultants are teachers and students of the business development profession and are constantly reading, attending webinars and conferences, taking classes, 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, 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 and respond to challenging Government requirements 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. These courses have the option of self-paced on-demand, live virtual and live corporate training. In addition, we are offering the full suite of training courses through an annual subscription that can be purchased and paid monthly or as one payment. We are also available to discuss custom training options that are not described in this catalog.

2 Foundations of Federal Business Development

This Government Business Development training offers essential skills in professional business development for Government contractors selling services and solutions to the Federal Government. The course begins with an overview of the Federal business development (BD) process and what it takes to succeed in the profession. It proceeds to the basics of U.S. Government business and focuses on the nuances of Government contracting that every Federal business developer must understand in order to win contracts—such as the rules of the socioeconomic program for small businesses, and how you can make the program serve your goals even if you do not directly qualify for the benefits.

This comprehensive, self-paced program also teaches practical skills in conducting market research to both identify Federal agencies as target customers and build a robust Government opportunities pipeline. The pipeline module covers a variety of techniques, from determining your opportunity search criteria to prioritizing must-win opportunities and explains the leading free and paid market tools available for Government opportunity identification.

After thoroughly explaining tactical tasks, the course demonstrates strategies for business development planning that every Government business developer needs to know. It culminates in guidance on engaging effectively with Federal customers, helping you become a trusted adviser—and on marketing to the Federal Government using a government-focused capability statement and a variety of proven techniques to engage with Government officials who are often difficult to reach. It also introduces the concept of capture management to help you prepare effectively for proposal writing.

Gain an understanding of the Federal Business Development life cycle, learn how to navigate the U.S. Government marketplace, perform strategic business development planning, dive into Government market research and analysis, master Federal marketing and sales, understand the intricacies of opportunity pipeline development, and qualify opportunities like a pro—all to maximize your Government contract win probability.

This course features a mix of engaging video instruction, interactive exercises, and real-world examples that simulate the hands-on experience of our previous live workshops.

The experts who created our Foundation of Federal Business Development training are highly experienced, currently practicing Federal proposal professionals whose years of successful experience in Government acquisition and training allow them to offer valuable insights to students. Through the course materials, they address common challenges, share industry best practices, and provide examples based on current realities. Check our instructors' bios on our About page.

Professional Certification: This is either a major or elective course that provides equivalent credit toward Bid & Proposal Academy certification (depending on the certification type). Completing this course will earn you 3 CEUs or more toward your APMP certification, or PDUs toward your PMP (check with PMI for current requirements). At the end of the course, you will receive a Certificate of Completion.

Who should take this course: Government contracting business owners, executive leadership, Federal business developers, account managers, Federal marketing and sales managers, program staff who interface with Government customers, capture managers, and proposal managers

Course materials: Course workbook (digital), interactive handouts, and handy reference tools.

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
- Navigating Federal regulations
- 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, team partners, and bid opportunities
- Building an opportunities pipeline
- Using bid pipeline tools effectively
- Qualifying a bid opportunity to ensure the highest Pwin
- Setting strategies for winning government contracts
- Calculating business development budget
- Identifying Must-Win bid opportunities
- Understanding the rules of marketing to the Federal Government
- 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
- Targeting a potential teammate
- 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 must take to succeed in the federal marketplace

Module 1: How to Succeed in Business Development (con't.)
- A perfect Business Developer – how to become the secret weapon for your company's explosive growth
- Federal Business Development skills and essential qualities

Module 2: Foundations of Federal Contracting
- The basics of doing business with the government
- Taking care of registrations (whether you are new to Government business or not)
- Minding your D&B rating and PAYDEX score
- Federal market snapshot: who are the target agencies and buyers, and how to identify them
- How to navigate the Federal Acquisition Regulations (FAR) and Government agency guidelines like a pro

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
- Small and disadvantaged business types in the socioeconomic program
- Using socioeconomic programs to your advantage (small business, HUBZone, 8(a), WOSB/EDWOSB, SDVOSB, VOSB, etc.)
- Qualifying for an 8(a) and HUBZone programs
- Benefits and pitfalls of the 8(a) and HUBZone programs
- The scoop on SBA and other Mentor-Protege Programs, including what to ask from your mentor
- Determining your business size using NAICS codes, and why size makes a difference in Government procurement
- Primary and secondary NAICS selection strategy

Exercise: Using a case study, determine what the company is missing for it to succeed in the Federal Government Market

Module 5: How the Government Enters into Contracts
- Forms of selling to the Federal Government
- Competitive outlook in Government procurement to determine the market openness for your offerings
- Government purchasing thresholds and micro-purchasing
- Five tests to determine whether you need a GSA schedule
- Government contract types and why they are important
- Goals of Government business development and capture
- Single and Multiple award contracts
- Sole source awards
- Becoming a Defense Logistics Agency (DLA) supplier
- Reverse auctions
- Grants
- Public-private partnerships
- R&D-related vehicles such as SBIR solicitations
- Evaluation on the Best Value Continuum, from Lowest Price Technically Acceptable (LPTA) to Best Value Tradeoffs
- Scenario-based Discussion: Discuss strategies for Government procurement at 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 Government market research like a professional analyst
- Performing an initial competitive analysis
- Finding government contacts
- Getting maximum help from OSDBUs 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 Government customers
- How to leverage your workforce and partners

Day 2 Highlights

Module 8: How to Obtain Sole Source Awards
- How to reduce competition and win sole source awards
- Adding scope to your existing Government contracts
- Understanding regulations for issuing sole source Government contracts
- Sole source contract award process for businesses not subject to statutory exceptions
- How to write unsolicited proposals for Government agencies
- How to work with Government to facilitate a sole source award
- How to write proposals for sole source procurements
- How to contribute to effective Justification and Approval (J&A) for a sole source proposal
- How to receive an 8(a) sole source award
- How to get an SDVOSB sole source award
- How to get a WOSB and EDWOSB sole source award
- How to get a HUBZone sole source award

Module 9: Additional Methods of Building a Pipeline
- How experienced Government contractors create opportunities for themselves
- How to identify immediate bid opportunities to add contract revenue
- Additional techniques to attract Government opportunities to your company
- Venues where to talk to Government customers
- Qualifying an opportunity to ensure it fits within your strategic business development plan, has high win probability (Pwin), and low execution risk
- Qualifying opportunities to ensure it fits within your BD plan, has a high win probability, and low execution risk

Exercise: Qualify an opportunity

Module 10: Strategic Business Development Planning
- Four main goals of a Strategic Business Development Plan
- Methodology for conducting a business development strategy planning session
- How to transition from subcontracting to priming in the Government market or enter the Government market as a new business

Module 10: Strategic Business Development Planning (con't)

- How to develop a business development budget and identify how many proposals do you need to write to achieve the desired growth.
- Analyzing and expanding your core competencies.
- Identifying Must-Win bid opportunities.

Strategies for winning Government contract bids consistently.

Exercise: Calculate a business development budget based on a scenario

Module 11: Engaging with the Federal Customers

- How to market to the Federal Government
- The rules of marketing to the Federal Government you cannot break at any cost
- How to get a meeting with a Government official
- What marketing collateral you need for effective Federal business development
- What information to include in a high-impact Government capability statement, specific to Federal customers
- How to legally "wire" the Government bid to your company
- Professional associations to join for Government business development purposes
- How to target potential teammates to be added to a winning bid team
- Four important goals of working with the customer
- How to prepare for an effective capture and proposal process (and what an effective capture process will help you achieve beyond business development)
- How to attract Government customers to your company through Web and social media
- Low, medium, and high-cost Government marketing activities

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

Module 12: Transitioning to the Capture Process

- Qualifying a bid opportunity
- Gate review that kicks off the capture process
- Components of the capture process are important for Federal business development and proper positioning to write a winning proposal

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.

*Please note that this course is only available as a corporate training offering.

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
- Business Development (BD) life cycle and its key steps
- Your job is not business development – or is it?
- Where and how you fit into the BD Process
- BD functions of onsite/project staff
- Where your roles fit with the BD organization's roles

Module 1: Understanding Business Development as a Project Person (con't.)
- Who is who in your BD organization
- What your BD organization does
- Opportunity identification
- Capture management and six aspects of capture
- Proposal management other tasks to feed the "growth engine"
- Overcoming the reluctance to "sell"

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

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 will your BD organization 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 does your BD organization need and why
- Collecting intelligence during project execution onsite
- How to collect intelligence at 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 be figured 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

- Contributing effectively to the solution development, win strategy sessions, and other BD organization-driven workshops
- Recapping the course
- Checking knowledge
- Discussing takeaways and questions

4 Foundations of Capture Management

Foundations of Capture Management training will arm you with real knowledge and tools you can apply immediately to capturing Government contracts and dramatically improving your win probability (Pwin). 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).

Your chances of winning Government proposals without capture planning are the same as cutting classes during the semester in college and hoping to get an A on the final exam—it can happen, but "hope to win" is not a sound business strategy for a Government contracting company (or any business).

To raise your win rate, take this capture management course to master techniques for customer engagement, intelligence gathering, win strategy development, competitive analysis, teaming, solution development, and more.

This course uses real bid opportunities to give learners practical experience with all the key steps involved in capture management. You'll develop core elements of a capture plan using templates and guided examples provided with the course, and work through case-based scenarios that strengthen your ability to apply proven capture strategies.

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

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 class project

Module 2: Customer Engagement
- 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

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

5 Advanced Capture Management

OST's optimized capture process (as opposed to Shipley's training) focuses on only six areas of capture that make a winning difference: customer engagement, intelligence gathering, win strategy development, competitive analysis, teaming, and solution development. This course shows the holistic view of how all these areas impact one another, versus a linear process, ensuring deeper understanding of capture planning that increases your Pwin.

Participants will brainstorm using a variety of case studies to learn the principles taught in the course.

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, expanding 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 self-paced course includes interactive lessons with lectures, exercises, case studies, and discussions that replicate the depth of our former live workshops.

The experts who teach our business development, capture, and proposal training courses are highly experienced currently practicing proposal professionals whose years of successful experience in Government acquisition and training allow them to offer valuable insights to our students. Our instructors can answer tough questions through the course content and supplemental materials. They can also tailor examples to address common challenges and share their experience based on the most current realities.

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 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 bidders' 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

service@ostglobalsolutions.com
www.ostglobalsolutions.com
301-384-3350

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
- Mind set for achieving the most results with Government customers
- 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
- Mind set for achieving the most results with Government customers

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
- 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 applications
- 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
- When it is best to move forward with a teaming arrangement and when to wait
- 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
- Small business subcontracting
- Understanding size rules and potential disqualifiers
- Elements of a binding teaming agreement
- Small business subcontracting
- How to negotiate for success and follow the Government contracting and subcontracting negotiating template
- 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 8: Capture Process Management

- Conducting gate reviews focused on results and measurements.
- Metrics for capture effectiveness.

Discussion: Technique applicability to participants' organizations.

Module 9: Summary

- Additional resources and bibliography
- Summary
- Recap

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 team 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

Exercise: 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
- Filing Freedom of Information Act (FOIA) requests for cost proposals

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
- 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

Module 9: Mastering the Labor Rate Analysis for Government Proposals

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

This Proposal Theme Statements and Win Strategy training offers valuable skills in developing proposal win themes — the most important element of persuasion. As a core component of win theme development, this course also covers win strategy development techniques that are indispensable in Government capture management.

This course emphasizes that win themes are primarily a function of capture management and should drive your win strategy, not the other way around.

The program walks you through the purpose of win themes, their various types, and their three building blocks. It explains how they are used at every stage of the capture, proposal, and proposal evaluation process. The course then advances beyond the basics to teach everything needed to develop effective, high-impact proposal win themes. You'll learn how to write win themes that are memorable, compelling, and capable of making your company stand out among competitors — influencing your Government customers so they feel confident selecting your solution.

You'll gain practical techniques and apply them through guided exercises that show how to transform win themes into actionable win strategies to help increase your proposal's win probability (Pwin).

This self-paced course helps you master an efficient process for identifying the right win themes within hours — eliminating unproductive brainstorming sessions and overused statements such as "we are the lowest risk, best value provider" or "we are ISO or CMMI certified."

Participants will learn how to effectively facilitate win theme development sessions and build persuasive strategies with clarity and confidence.

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

 Day 1 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

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
- Preparing proposal kickoff materials
- Planning for the kickoff

Exercise: Go through the requirements for the draft Kickoff Brief for the practice proposal.

Module 7: Placing Win Themes in the Proposal

- Examples of how win themes should appear in a government 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

Foundations of Proposal Management covers the proposal development process flow, starting with the Government RFP analysis. It then moves into federal proposal writing planning (including an alternative to storyboarding) and teaches how to develop an annotated outline and proposal schedule. It also covers preparing for and conducting a proposal kickoff meeting to organize your team, as well as managing proposal writing effectively to develop winning content.

The course also 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 Government debriefs.

This course is for you if you are looking to acquire practical skills in writing and managing federal proposals.

Our Bid & Proposal Academy courses provide the most comprehensive Government proposal training, going beyond just process and teaching you the detailed "how-to"—showing you exactly how to win Government proposals.

This self-paced course combines engaging video instruction, guided exercises, and real-world examples to simulate the interactive experience of our live workshops.

The people who will benefit from this proposal training are:

Proposal managers who are new to Government proposals, those transitioning from the commercial world, or those beginning to build their expertise in proposal management.

Proposal writers and coordinators who have gained experience through on-the-job training but want to strengthen their skills through structured instruction.

Capture managers who want to become more well-rounded in winning Government proposals.

Proposal managers and coordinators who seek faster, more efficient methods to improve proposal quality and win rates.

Professionals who received proposal training years ago and want to refresh their skills and learn the latest best practices.

Anyone interested in adopting a repeatable, efficient proposal process that eliminates the need to start from scratch each time.

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

Upon course completion, the participants will have learned and be able to put into practice (con't.)
- 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

Discussion: Proposal process observations

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. How to create a compliant proposal outline that helps get the highest score

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
- How to develop an RFP compliance matrix, and compliance checklist to ensure that you don't miss any RFP requirements

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 daily
- 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

Module 10: Summary and Recap
- 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

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% 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 input 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 lesson-learned session
- Making use of personal and organizational proposal process optimization

Advanced Proposal Management: Curriculum

Day 1 Highlights

Module 1: Introduction
- Introductions and learning objectives
- Recap: Overview of the proposal process from an advanced big-picture perspective

Module 2: Preparing for the Proposal Effort
- 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 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

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

Module 5: Overseeing the Development of Winning Volumes and Sections (con't.)
- Managing simultaneous oral 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 daily
- Team-building techniques
- Key management skills that distinguish great proposal managers from the rest
- Keeping 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
- 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 related to proposal color reviews, and how to successfully navigate through them

Discussion: Troubleshooting organizational review processes and identifying improvements

Module 8: Improving Proposal Performance
- Troubleshooting your proposal development plan and proposal risk management
- 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

You will learn the science of proposal persuasion through techniques that create vivid mental imagery in Government evaluators' minds and bring dry proposal content to life. This course teaches you how to tell the right types of stories in your proposals—stories that engage evaluators, differentiate your company, and make your solution memorable.

You will also learn to recognize the differences between effective and ineffective proposal language, and master self-editing techniques (including editing automation) that dramatically improve writing efficiency. The course covers practical methods to write faster and better, overcome writer's block, and improve readability through clarity and flow.

You will acquire techniques and tools that can transform even the most reluctant non-professional writers into prolific and confident proposal contributors. You'll be able to bring this knowledge back to your organization to provide just-in-time training for Subject Matter Experts (SMEs), helping them produce stronger proposal sections, reduce rewriting cycles, and minimize stress.

This self-paced course includes interactive exercises designed to double your proposal writing speed while improving quality and persuasiveness. By the end, you'll find technical writing more structured, less time-consuming, and far more rewarding.

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

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 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

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

Module 10: Use of Story in Proposals
- How to use stories that make 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

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

Module 13: Copy Editing and Editing Automation
- 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 to configure and apply proposal editing tools
- Readability and its tool
- 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
- How It All Maps to the Proposal Process.
- Summary Recap

11   Winning Government Cost Proposals

This self-paced course combines in-depth instruction, guided exercises, and practical examples to help you apply each concept directly to real-world proposal situations.

The experts who created our business development, capture, and proposal training are highly experienced, currently practicing proposal professionals whose years of successful experience in Government acquisition and training allow them to offer valuable insights. Through the course content, they address common challenges, share best practices, and illustrate techniques based on the most current industry realities.

Cost volume development training starts with cost proposal literacy. It shows the differences between cost, price, pricing strategy, and price-to-win, and delves into key cost buildup elements such as fringe, overhead, G&A, and fee. It covers allowability, allocability, and reasonableness of Government costs, and a range of other important compliance rules.

The course then explores how the Government evaluates cost proposals so you understand what happens "behind the curtain." You'll learn cost proposal management during capture, competitor price analysis, and price-to-win fundamentals. It also provides practical methods for developing pricing assumptions, setting cost boundaries, and bridging the gap between proposal managers leading the technical team and those responsible for pricing.

The advanced modules focus on higher-level cost volume techniques, including developing persuasive cost proposal narratives, creating Bases of Estimate (BOEs) and Work Breakdown Structures (WBS), and crafting winning strategies to maximize profit while reducing risk for each contract type. You'll also learn how to refine and finalize your cost volume for maximum impact.

Pricing is often the most critical factor in Government proposals—it's where you can differentiate your company from technically equal competitors. This course ensures you understand both the process and the deliverables for the cost volume so you can excel where many others struggle.

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

The participants will learn and practice skills in (con't.):
- 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
- Apply persuasive techniques in your 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
- Create Work Breakdown Structures (WBS) that align with your pricing strategy
- Use Bases of Estimate (BOE) to differentiate your pricing and outmaneuver low-cost competitors

Winning Government Cost Proposals: Curriculum

Day 1 Highlights

Module 1: Cost Proposal Training for Non-Finance Professionals
- Roadmap to win 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

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 proposals 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 and 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 contract
- 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. This course dives into the intricacies of developing proposal outlines, annotating these outlines, preparing compliance and cross-reference matrices, and preparing storyboards or work packages correctly. It begins with analyzing different types of Requests for Proposal (RFP) and Requests for Quote (RFQ) formats to show how various customers organize their requirements.

A great outline reduces stress and rework during the proposal development process. It helps direct the authors and integrate the proposal from the start. The course delves into when the 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 professionals in Proposal Management, Proposal Writing, and Proposal Coordination. It teaches essential skills in annotated outlines and storyboard development. Learners explore the outlining topic in greater depth than in our Foundations of Proposal Management and Writing Persuasive Federal Proposals courses.

It addresses common challenges for proposal practitioners through individual and guided practice exercises, helping you apply new skills directly in a "learn by doing" format. The course focuses on the nuances of outline and storyboard development that distinguish true proposal professionals.

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 the 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.

In addition to brainstorming graphic ideas, this course teaches how to design compelling action captions, sketch clear and impactful graphic concepts, determine how to deliver specific visual messages to Government customers, and apply professional design principles to create attractive, persuasive proposal graphics.

Professional proposal graphics artists are not the only ones who need to learn how to conceptualize and design strong visuals. This skill is also indispensable for capture managers, proposal managers, and proposal writers.

Desktop publishers and editors will also benefit greatly from this proposal graphics training, expanding their professional range and earning potential. The course is especially valuable for professionals in small Government contracting businesses who may not have access to a dedicated graphic artist and need to design visuals on their own.

This self-paced course walks you through the entire process of creating visuals for your solution — from managing the graphics workflow to conceptualizing and designing graphics-intensive items such as cover pages and spines. It includes practical exercises, real-world examples, and downloadable templates to help you immediately apply what you learn.

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 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)

Government proposal desktop publishing (DTP) training teaches valuable skills in designing, laying out, and publishing Government 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, along with shortcuts to increase speed and efficiency. It advances into the selection of color palettes and styles, tables of contents, headers and footers, and design elements to ensure your document is visually appealing. It culminates in learning how to publish and prepare the document 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 course provides downloadable practice files as you work through the process of building a proposal volume. It features a balanced mix of instructional video lessons, interactive exercises, and guided examples that help you learn 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
- 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
- Toolbars and Rulers
- Moving the Quick Access Toolbar
- Populating Quick Access Toolbar with your favorite tools

Module 2: Preparing for Graphics Development
- Choosing a color palette
- Comprehension and incorporation of the Solicitation Requirements
- Styles:
  - What is Normal
  - Populating Quick Access Toolbar with your favorite tools
  - How does Normal affect styles
  - Creating and editing styles
  - Import styles into another or a new document
  - Displaying styles so other users can apply them
  - Cleaning up styles
  - Column Breaks
  - Page Breaks
  - 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 (IDVs) and how to capture task orders on those vehicles successfully.

Today, winning Government contracts is all about having the right portfolio of IDVs. This is how the Government prefers to engage companies and issue awards. Multiple award IDVs—including Indefinite Delivery Indefinite Quantity (IDIQ) contracts, GSA Schedules, BPAs, and various ordering agreements—are awarded to limited groups of contractors who then compete for task orders (also called delivery orders or call orders).

Once awarded, IDVs enable companies to grow rapidly because they can win task orders within weeks instead of months or years required for single-award contracts.

According to Bloomberg Government analysts, here are some critical facts about multiple award IDIQ contracts to consider:

The Federal Government prefers IDVs. Total IDIQ spending continues to rise even as overall procurement spending decreases. The law requires all contracts with a potential value of at least $100 million to be awarded through IDIQs. More work is shifting under IDVs—meaning that without holding the right contract, your company may miss out on the most lucrative opportunities.

Only about 3,600 companies out of hundreds of thousands of Government contractors participate in non-schedule IDVs. This number has remained stable for years, which means that a small fraction of informed companies capture the majority of opportunities. It's time to learn how to join their ranks—and even lead the pack.

Agencies keep selecting the same companies even as they expand the number of competitors on IDVs. The companies that have mastered the system of winning on these vehicles continue to grow their IDIQ footprint. Understanding their methods is the key to catching up—and this course will show you exactly how.

This self-paced course reveals how to win IDIQs against dozens (or even hundreds) of competitors, including preparing a competitive price proposal. You'll also learn proven techniques for winning task order proposals.

Proposal deadlines and page counts are shrinking while competition intensifies, making it harder to win even when you're the most qualified bidder. Many proposal teams only learn about task order requests when they're released, leaving minimal time to respond. This course teaches you how to implement a system that maximizes your task order win rate and accelerates your response time.

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
- IDV foundations- what are the vehicles and how can a company make money on an IDIQ
- IDV benefits and trends in Government procurement.

Module 2: Understanding IDIQs and Defining Your Company's MAC Needs
- 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 spend 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
- 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, IDIQ-specific competitive analysis, teaming, and solution development

  Exercise: Perform a competitive analysis for an IDIQ with multiple competitors

Module 4: Developing a Solution and a Winning Proposal for a MAC
- 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
- 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 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 a typical 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 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

The polished, professional appearance of your proposal is paramount to making a positive impression on evaluators.

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

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. Instead, it's a hands-on, practical training filled with examples and exercises that help you master techniques for rapid and accurate editing using commonly available tools and professional editing applications.

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, 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 reduce 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
- Consistent one-voice even if multiple writers contributed to proposal development
- Properly introducing figures and tables

Exercise: Edit section for length and structure

Day 2 Highlights

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 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

Master AI to Enhance BD, Capture and Proposal Processes

Are you ready to enhance your bid flow, improve your Pwin, cut down the time it takes to do most BD tasks, improve decision-making, and reduce proposal risk by ensuring your submissions are compliant and compelling? This course is specially designed for BD professionals in Government contracting firms seeking to harness the power of AI in their operations. Over three comprehensive sessions, you will gain the knowledge and tools to transform your BD strategies and execution.

Are you ready to enhance your bid flow, improve your Pwin, reduce BD task time, improve decision-making, and minimize proposal risk by ensuring your submissions are compliant and compelling? This course is designed for BD professionals in Government contracting firms who want to harness the power of AI to revolutionize their operations.

Over three comprehensive sessions, you will gain the knowledge and tools to transform your BD strategies and execution using AI.

It's not the AI itself that will take over everyone's jobs and contract wins—it's the professionals and companies who expertly leverage AI. Gain the edge to maintain your professional relevancy and secure a competitive advantage in the rapidly evolving landscape of Government contracting.

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

- Grasp how generative AI works and its role in safeguarding competition-sensitive information, enhancing data security, and protecting intellectual property in business development activities
- Learn to leverage AI for filling and advancing your BD pipeline, matching opportunities with company strengths, increasing efficiency, and improving opportunity alignment
- Master the art of crafting effective AI prompts—from basic to advanced levels, including chain-of-thought prompting—to extract more relevant and accurate insights for BD activities
- Discover how AI aligns with and amplifies the core elements of the capture process, bringing greater efficiency and strategic depth to customer engagement and intelligence gathering
- Employ AI for deep customer analysis to create more effective engagement strategies and build stronger customer relationships
- Use AI to develop data-driven proposal themes and win strategies, increasing your likelihood of success in competitive bids

Master AI to Enhance, BD, Capture and Proposal Processes: Curriculum

Module 1: Introduction to AI in Government BD and Prompt Engineering

- AI Fundamentals: Understanding how generative AI works, AI security, and protecting your company's competition-sensitive information and intellectual property.
- AI in Government BD Lifecycle: How AI is transforming Government BD, capture, and proposal development workloads in every step of the BD lifecycle.
- Getting the Best Results from AI Through Prompt Engineering
- Basics of Prompt Engineering:
- Secrets for how to get superior results from interactions with generative AI.
- Introduction to crafting effective prompts for AI.
- Building complex prompts for specific tasks.
- Advanced Prompt Engineering Concepts:
- Advanced techniques for nuanced and complex AI interactions.
- Chain of thought prompting.
- Prompt Crafting Exercise: Participants practice crafting prompts at basic, intermediate, and advanced levels.
- Exploring AI Agents
- Introduction to AI Agents: Overview of AI agents, their capabilities, and roles in automating complex BD, capture, and proposal tasks.
- Practical Applications: Discussing real-world applications of AI agents in Gov't BD.
- Interactive Demonstration: Showcasing an AI agent setup or interaction relevant to BD.
- Enhancing Your Pipeline with AI
- **Quiz**

Module 2: AI in Pipeline Development

- The Role of AI in Pipeline Development: Introduce how AI tools can help you fill your pipeline and advance opportunities through its stages
- Identifying and Qualifying Opportunities Using AI
- Matching Opportunities with AI: Discuss how AI can be used to align opportunities with a company's strengths, past performance, and capabilities
- Effective AI Prompts for Opportunity Matching: How to craft AI prompts for analyzing opportunities
- Incorporating AI into Qualification Criteria: Explore how AI can assist in researching opportunity information and applying qualification criteria to opportunities
- Opportunity Matching Exercise: Participants practice matching an opportunity to a company's capabilities and past performance

Quiz

Module 3: AI in Capture Management: Customer Engagement, Intelligence Gathering, and Win Strategy Development

- AI Integration in the Capture Process
- Introduction to AI in Capture Management: Overview of how AI use cases align with and enhance OST's six elements of the capture process
- AI-Enhanced Customer Engagement

Module 3: AI in Capture Management: Customer Engagement, Intelligence Gathering, and Win Strategy Development (con't.)

- Using AI for Customer Analysis: Detailed look at how AI tools can help understand and engage with customers effectively
- Interactive Exercise: Participants use AI to analyze customer data and create engagement strategies.
- AI in Intelligence Gathering
- Efficient Market and Customer Intelligence with AI: AI applications in gathering opportunity intelligence and insights.
- Demo: Real-time AI opportunity intelligence gathering and analysis.
- Developing Win Strategies with AI
- Incorporating AI in Win Strategy Formulation: How AI can contribute to developing robust and data-driven proposal themes that help derive effective win strategies.

Quiz

Module 4: AI in Capture Management: Competitive Analysis, Teaming, and Solution Development

- AI-Driven Competitive Analysis
- Leveraging AI for Competitor Insights: Using AI tools to analyze competitors and inform strategic decisions.
- Practical Session: AI-based competitive analysis on a given scenario.
- AI in Teaming Strategies
- AI Applications in Identifying and Assessing Partners: Exploring how AI can aid in finding and evaluating potential partners for teaming.
- Demo: Partner selection using AI tools.
- AI in Solution Development
- Enhancing Solution Development with AI: Using AI for tailored solution brainstorming and innovation.

Quiz

Module 5: Streamlined AI Tools in Proposal Writing

- Understanding AI in the Context of Government BD
- AI Fundamentals: Understanding how generative AI works, AI security, and protecting your company's competition-sensitive information and intellectual property.
- AI in Government BD Lifecycle: How AI is transforming Government BD, capture, and proposal development workloads in every step of the BD lifecycle.

Quiz

Module 6: Perfecting Your Proposals and the Future of AI

- AI-Assisted Compliance Checks and Proposal Reviews
- Best Practices in Proposal Reviews: Conducting proposal color reviews using AI for compliance checks and content improvement against the evaluation criteria.
- Hands-on Exercise: Conduct proposal section review against the requirements.
- Emerging AI Trends
- Emerging AI trends. AI trends and their implications for the profession of Government BD, capture, and proposal development.
- Toward Artificial General Intelligence (AGI): How AGI is different from AI and how it may change the profession.
- Course takeaways and review.

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 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