

WE EMPOWER  
**Learning**



# SHIPLEY

## TRAINING CATALOG



*ShipleyAssociates®*

WWW.SHIPLEYWINS.COM

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# Shipley Certification



**Shipley** offers certification for business development professionals seeking to validate their learning and course completion.

## Shipley Business Development Certification

Certification requires completion of all of these **core** Shipley courses (classroom or online):

- Capture Management
- Proposal Management
- Proposal Writing

Plus, a total of four (4) learning units in these related courses (classroom or online):

- Pricing-to-Win (2 units)
- Winning in the Cost Volume (1 unit)
- Qualifying to Win (1 unit)
- Competitive Analysis (Richter and Co.) (1 unit)
- Winning Executive Summaries, Winning with Task Orders, Winning in Past Performance (1 unit each)
- Foundations of Proposal Development; online or self-paced (1 unit)
- Winning Color Team Reviews (1 unit)
- APMP Foundation Certification (1 unit)
- Any Shipley self-paced course (1/3-unit each)

Standing out from the crowd as a business development professional can be difficult. Shipley certification adds value to your experience and education and helps improve your position in the job market.

**6** CORE units      **4** ELECTIVE units

Capture Management  
Proposal Management  
Proposal Writing  
(online or classroom)

Pricing to Win  
Cost Volume  
Executive Summaries  
Foundations (APMP)  
Qualifying to Win  
Self-Paced Courses

**CERTIFIED**

*Shipley certification requires completion of core courses plus elective training courses.*

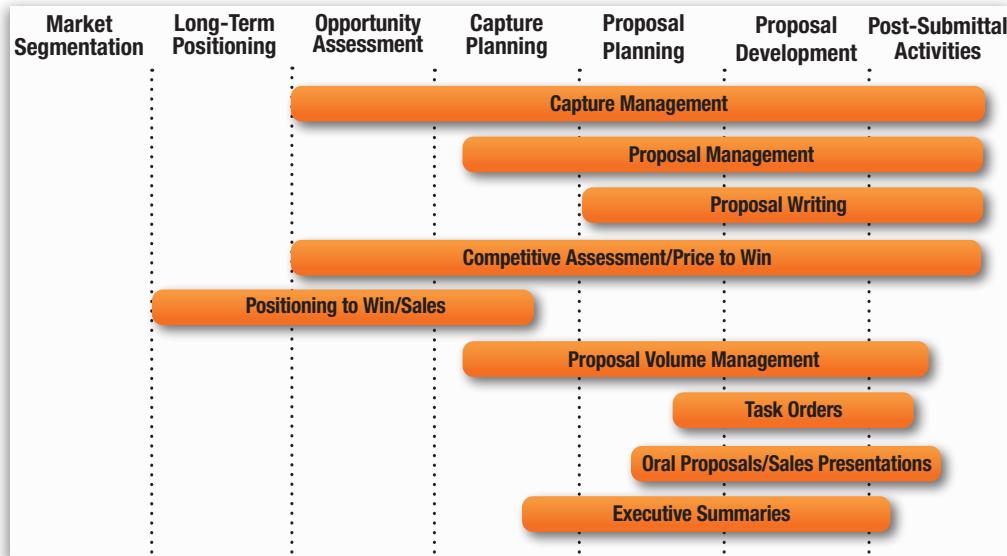
Shipley certification gives you that edge. Combine this with APMP certification and you have unique credentials to support your work experience and formal education.

# OVERVIEW *of* SERVICES

## Professional Training and Development

Building long-term, sustainable talent and competency requires training and professional development activities. Shipley offers flexible options to help clients learn industry best practices for winning business.

Skilled Shipley facilitators bring practitioner experience to each training workshop. Multi-media case studies help participants apply what they learn through simulations and exercises—learners learn by doing.



## Capture and Proposal Consulting Solutions

- Providing proven personnel and best practices to help clients succeed.
- Augmenting proposal teams to provide “just in time” resources needed to produce a competitive proposal
- Establishing long-term customer relationships
- Evaluating the necessary infrastructure and processes
- Winning strategic, competitive bids to Government or business customers
- Supporting program management and execution
- Proposal center operations outsourcing

# Core Courses for Basic Certification

## 6 learning units

**Three Core Courses.** BD professionals must complete the core flagship Shipley courses: Capture Planning, Proposal Writing, and Proposal Management. Courses taken since 2007 can apply toward certification. Each 2-day course is two professional units.

Each course includes a participant manual, tools and templates, and other reference material. Core courses can be taught onsite at a client location or through the Shipley Associates public workshop program.



*Workshops that qualify to meet the core requirement can either be Government or Business-to-Business focused.*

# Writing Federal Proposals

## Course Overview

*Writing Federal Proposals* teaches skills related to planning and writing sections in any portion of a proposal. While basic principles are applicable to all markets, course content and examples place heavy emphasis on U. S. federal acquisition practices.

The workshop is delivered from the perspective of a section author and emphasizes the importance of addressing assigned responsibilities and supporting overall proposal and volume strategies. It also teaches authors their roles as team members and introduces proposal operations in sufficient detail to promote understanding of an author's obligations to the larger work group.

Note that this workshop covers skills relevant for individual section authors, but not all skills necessary to create a completely compliant and responsive proposal. Our companion workshop, *Managing Federal Proposals*, covers strategy development, compliance checklists, outlining, and review preparation, among other topics related to proposal team leadership.



### Shipley Proposal Guide™

The Shipley Proposal Guide™ contains 52 topics and 12 model documents. Each topic section provides a summary of key points.

## Workshop Description

Workshop participants learn and practice a proven process for planning content and layout of winning proposal sections. They also learn how to be sure their sections will score highly during evaluation through a government evaluation simulation. Given a section assignment for a real government procurement, students will:

- Attend a model proposal kickoff meeting to obtain instructions from the proposal manager
- Plan content using a storyboard to be compliant and implement approved proposal strategies
- Incorporate effective graphics and captions to better communicate messages
- Mock up section layout
- Organize content to be persuasive
- Write the planned proposal section
- Examine the section draft for effectiveness
- Consider revisions of the draft in response to feedback
- Collaborate and coordinate with other team members writing different sections of the proposal

### Who Should Attend

- Proposal Contributors
- Proposal Writers
- Proposal Managers
- Business Developers and Capture Managers
- Proposal Coordinators

### Workshop Length

- 2 Days
- 2 Shipley University® Units

### Workshop Material

- Workshop Manual
- *Shipley Proposal Guide*™

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# Winning Sales Proposals

## Course Overview

Improve your sales effectiveness with proven proposal development tools and techniques that support your sales objectives. Learn to:

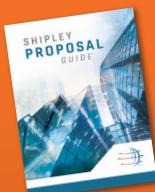
- Plan customer-focused proposals that sell
- Align your sales and proposal strategies
- Integrate your sales strategy into the proposal
- Exceed customer expectations on every proposal

Winning Sales Proposals will teach you to align your proposal to customer needs and allocate resources in a way that improves your overall win rate.

## Workshop Description

Using simulations, discussions, and role-plays, Winning Sales Proposals participants learn and practice the skills to plan and prepare winning proposals:

- Select Winning Proposals. Gain a competitive advantage by understanding how proposals are evaluated and how winners are selected.
- Position Your Proposal to Win. Learn a “framework process” to identify resource needs and competitive information necessary for developing a winning proposal. Learn to develop an effective sales strategy built on bringing value to the customer.
- Plan Your Proposal. Learn the steps to plan a responsive, customer-focused proposal by determining the best proposal style, establishing a baseline solution, preparing a proposal outline, and extending the sales strategy into a proposal strategy.
- Amend Before Submittal. Improve your competitive position by using self- and peer-reviews to amend your proposal. Use best-practices guidelines to reduce rework, rewrites, and waste.
- Existing Sales Tools and Techniques. Use time-saving tools and techniques to generate a customer-focused proposal.



### Shipley Proposal Guide™

Included with Shipley's Winning Business workshops

The **Shipley Proposal Guide™** contains 52 topics and 12 model documents. Each topic section provides a summary of key points.

### Who Should Attend

- Sales Professionals
- Account Managers
- Sales Support
- Proposal Team
- Solution Managers

### Workshop Length

- 2 Days
  - 2 Shipley University® Units
- 
- ### Workshop Material
- Workshop Manual
  - Shipley Proposal Guide™

**Introduction**

Module Objectives.....	Intro-1
Superior Proposals Improve Win Rates .....	Intro-2
How Proposals Differ From Technical Documents.....	Intro-2
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**Selecting Winning Proposals**

Module Objectives.....	Select-1
Proposal Evaluation Simulation .....	Select-2
Identifying Features of Winning Proposals.....	Select-2
Proposal Features Influence Evaluators' Scores .....	Select-2
Indicators of a Winning Proposal.....	Select-3
Summary .....	Select-5

**Positioning Your Proposal to Win**

Module Objectives.....	Position-1
How Proposals Fit Within a Framework Business Development Process .....	Position-2
Rapidly Develop an Effective, Written, Sales Strategy .....	Position-5
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Use Theme Statements and Callouts.....	Prepare-8
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1. Jenair Proposal
2. EtherWinds Proposal
3. Evaluator's Package
4. Sales Proposal Planner
5. Proposal Assessment Checklist
6. Single-Layer Proposal Preparation Process
7. Organization Exercise
8. SLIM™ Case Study
9. Final Review and Amending Exercise
10. Final Review and Amending Exercise "School Answer"

**Workshop Materials**

Winning Sales Proposals workshop manual  
Shipley Associates *Proposal Guide*  
Handouts

# Managing Federal Proposals

## Course Overview

This workshop teaches essential skills for managing a full proposal or proposal volume in the U. S. federal market space. It focuses on how to lead teams to produce written or electronic proposals in response to a U.S. federal Request for Proposals (RFP), beginning with necessary preparation work that must precede assignment of topics to authors. It also develops detailed understanding of federal proposal evaluation processes and their impact on proposal planning and management.

Many of the skills imparted are applicable to commercial and non-federal government proposals. But students should understand the heavy emphasis on federal procurement and the fact that most case study and example material will reflect that orientation.

## Workshop Description

This interactive workshop builds the proposal management skill set through lecture, discussion, simulations, and exercises. It begins with a detailed

simulation of the government's evaluation of proposals for a real competitive procurement, creating insight into how proposals can be developed to score highly. It progresses through all necessary steps for planning and managing creation of a compliant sales document.

### You will learn to:

- Assess your own proposals like a government evaluation team
- Convert action-based capture strategies into message-based proposal strategies or win themes
- Develop a comprehensive compliance checklist
- Create a compliant proposal outline
- Assign requirements to appropriate authors for coverage in the proposal
- Prepare for and conduct an effective kickoff meeting, including providing clear instructions to authors
- Lead high-performing proposal teams on fast-paced schedules
- Prepare for effective reviews
- Exploit knowledge of the selection process to guide interactions with your customer after proposal submittal



*Shipley Proposal Guide™*

The Shipley Proposal Guide™ contains 52 topics and 12 model documents. Each topic section provides a summary of key points.

### Who Should Attend

- Anyone who manages government proposal efforts

### Workshop Material

- Workshop Manual
- *Shipley Proposal Guide™*

### Workshop Length

- 2 Days
- 2 Shipley University™ Units

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Newmanix	
Nunivak	
S2	

# Capturing Federal Business

## Course Overview

This workshop teaches you how to improve your competitive position before your customer releases a request for proposals. By learning how to select and pursue the most winnable opportunities, you can lower business development costs and increase revenue.

Working with a team representing one of several federal contractors, you'll cover topics including:

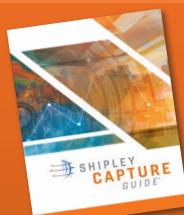
- Analyzing and building knowledge about potential business opportunities
- Understanding competitors and their likely approaches
- Developing strategically sound solutions to the customer's needs
- Influencing customers to prefer your solution over competitors'
- Contributing to bid and proposal efforts to build effectively on prior capture activities

## Workshop Description

This 2-day interactive workshop builds practical skills through lecture, presentations to course mates, and simulation of the pursuit of a real, competitive opportunity.

Learn a proven capture process for improving your win probability before a request for proposals is released:

- Reasons companies pursue business opportunities
- Opportunity assessment
- Capture plan preparation
- Customer buying behavior
- Business intelligence collection and analysis
- Competitor comparison
- Strategy development
- Influencing customers
- Supporting proposals



### Shipley Capture Guide™

Organized around 20 topics, the **Shipley Capture Guide** provides tools and templates to help organizations win business in varied selling environments.

### Who Should Attend

- Senior Executives
- Program Managers
- Capture Managers
- Proposal Managers
- Campaign Managers

### Workshop Length

- 2 Days
- 2 Shipley University™ Units

### Workshop Material

- Workshop Manual
- Capture Management Tools
- *Shipley Capture Guide*™

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# Elective Courses for Basic Certification

## 6 learning units

**Elective Courses.** Completion of four professional units from a variety of Shipley training is required beyond the core courses. Each day of training qualifies for one elective unit toward certification.

- Pricing to Win
- Positioning to Win
- Winning Executive Summaries
- Winning in the Cost Volume
- Winning Through Oral Proposals
- Winning with Task Orders
- Winning with Past Performance
- Foundation for Proposal Development (APMP)
- Decision Gates & Reviews
- Winning Color Team Reviews



*Equivalent non-Shipley courses also qualify, upon approval from Shipley's Director of Learning.*



# Pricing to Win

## Course Overview

*Pricing to Win (PTW)* focuses on the development and exploitation of competitive intelligence and analysis of relative positions of competitors. *PTW* is not a cost-estimating workshop. Instead, *PTW* emphasizes:

- Understanding customers' price/capability trade-offs
- Assessing competitors' likely positions
- Targeting a combination of price and capability that takes advantage of the customer's value system and expected buying behavior

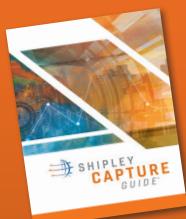
- Price-capability trade-offs
- Competitors' probable solutions and likely pricing strategies and tactics
- Iteratively adapting one's solution, price, and capture strategy to improve win probability
- Guiding proposal pricing efforts to ensure the offer places the organization in a position to compete and ultimately in a position to win
- Securing the award after proposal submittal by refining and executing pricing strategies

Participants actively engage in hands-on exercises based on a real-world competitive opportunity and explore adaptation of pricing-to-win principles to different business niches and customer types.

## Workshop Description

The 2-day workshop teaches skills related to:

- Customers' acquisition budgets, including sources and uses
- Customer assessments of bidders' proposed prices



### Shipley Capture Guide™

Organized around 20 topics, the Shipley Capture Guide provides tools and templates to help organizations win business in varied selling environments.

### Who Should Attend

- Business Development Professionals and Managers
- Financial/Technical Professionals
- Pricing Managers
- Capture Managers

### Workshop Length

- 2 Days
- 2 Shipley University® Units

### Workshop Material

- Workshop Manual
- *Shipley Capture Guide*™

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# Qualifying to Win: Improving Your Pwin

## Course Overview

This workshop teaches you to qualify opportunities through improved customer engagement. Well-planned questions that focus on customer needs, issues, and motivators are essential to qualifying effectively. Improve your Pwin using these key points:

1. Understanding the Current Sales Environment. Customers have more access to information than ever before. Understanding the customer buying cycle and decision-makers helps advance the opportunity. Learn why customers are more skeptical than ever and learn the importance of establishing trust.
2. Assessing Customer Needs. Asking good qualifying questions and actively listening help build trust with the customer. Learn about ways to uncover hidden needs and clarify issues and expected results through effective questioning.
3. Developing a Business Case. Customers make buying decisions once they can justify the cost and see the value of your solution. Learn to overcome customer obstacles by focusing on the benefits and results rather than the features of your solution.

The training is a blend of lecture, discussion, and exercises based on a real-world scenario.

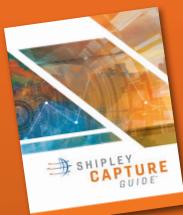
The facilitator guides the participants through the process of establishing a business case for making a buying decision. Topics covered during the training include:

- Mutually exploring customer needs, issues and challenges
- Identifying key decision-makers and their priorities
- Asking questions that uncover needs and issues
- Uncovering evidence and impact of issues driving the customer's need to seek solutions
- Actively listening and clarifying to establish trust and understanding
- Overcoming obstacles that might prevent the customer from buying
- Collaborating with the customer to build a value proposition
- Planning and scheduling customer engagement opportunities

This workshop builds on sales and capture efforts that aim to advance any sales opportunity.

## Workshop Description

This one-day, interactive workshop focuses on customer engagement using a sales case study as the basis for interacting with the customer.



### Shipley Capture Guide™

Organized around 20 topics, the Third Edition Capture Guide provides tools and templates to help organizations win business in varied selling environments.

### Who Should Attend

- Capture Managers
- Account Managers
- Sales Executives
- Business Development Specialists

### Workshop Length

- 1 Day
- 1 Shipley University™ Unit

### Workshop Material

- Case Study Materials
- Opportunity Planner and Worksheet
- *Shipley Capture Guide™*

# Winning Executive Summaries

## Course Overview

Executive summaries are key elements of your business development documents, often the only part decision-makers will read. Learn to write them quickly and effectively in this fast-paced workshop. Whether you sell to governments or other businesses, offer products or services, work for a large, established organization or a small startup, *Winning Executive Summaries* will give you knowledge and tools to enhance your performance.

Course topics include:

- Principles of customer focus
- Uses of executive summaries
- Planning
- Organizing
- Writing
- Examining for customer focus and effectiveness
- Revising to be clear, concise, and correct

## Workshop Description

*Winning Executive Summaries* is a 1-day, hands-on, skill-building session. It's packed with examples and tips on how to craft a hard-hitting executive summary organized around your customer's most important issues—the hot buttons.

Over the course of the day, through lecture, discussion, and practical exercises, you'll be guided to actually create a complete executive summary for a proposal of your choice from among three options:

- A "live" opportunity your organization is currently pursuing
- A past opportunity you won or lost, for which a powerful executive summary could have improved your chances or made your job easier
- A case study opportunity provided by your instructor

Whichever you choose, you'll learn to use customized tools for planning and writing with great efficiency. You'll receive those tools in electronic form to apply to your next executive summary. And you will have your completed summary to send to your customer or use as an example internally.



### Shipley Proposal Guide™

The Shipley Proposal Guide™ contains 52 topics and 12 model documents. Each topic section provides a summary of key points.

### Who Should Attend

- Market or Account Managers
- Sales Professionals
- Proposal Managers
- Capture Managers
- Business Development Managers

### Workshop Length

- 1 Day
- 1 Shipley University™ Unit

### Workshop Materials

- Workshop Manual
- *Shipley Proposal Guide*™

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# Winning in the Cost Volume

## Course Overview

Learn how to enhance your win probability, improve profit margins, reduce financial risk, and minimize cost decrements during contract negotiations with properly developed cost volumes. Clear, persuasive, and trackable cost volumes include the following:

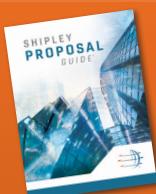
- Accurate and acceptable estimating techniques
- Clear task descriptions
- Supportable Basis of Estimates (BOEs)
- Brief yet comprehensive cost volume summary

To best meet the specific needs of each client, this modular workshop may be tailored to a specific audience. For example, managers may want to focus on developing the cost volume and cost volume summary, while contributors may need to focus primarily on how to prepare task descriptions and BOEs.

## Workshop Description

This interactive workshop builds practical skills through lecture, discussion, and skill-building exercises. The training addresses critical issues needed to gain a strategic advantage by enhancing the skills of the people who manage and prepare cost volumes:

- Understand how cost volumes are evaluated and what increases cost in evaluation
- Learn acceptable, allocable, and allowable costs
- Learn why and how to develop the RFP requirements checklist, CLIN, CDRL, WBS, and Program Control Matrix
- Learn to develop a WBS and WBS dictionary
- Develop appropriate and acceptable estimates
- Develop good task descriptions
- Develop defendable BOEs



### Shipley Proposal Guide™

Included with Shipley's Winning Business workshops

The **Shipley Proposal Guide™** contains 52 topics and 12 model documents. Each topic section provides a summary of key points.

#### Who Should Attend

- Account Managers
- Sales Professionals
- Proposal Writers
- Capture Managers
- Anyone who contributes to Executive Summaries

#### Workshop Length

- 2 or 3 Days
- 2 Shipley University™ Units

#### Workshop Material

- Workshop Manual
- *Shipley Proposal Guide™*

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# Winning Through Oral Proposals

## Course Overview

About 70 percent of verbal communication comes from non-verbal messages. Oral proposals must be just as compliant and responsive as written proposals, but winning an oral proposal requires a different set of verbal and non-verbal skills.

Many government and business-to-business customers are encouraging the use of oral proposals because they decrease selection time and costs, increasing the importance of gaining solid presentation skills.

## Workshop Description

*Winning Through Oral Proposals* is an interactive workshop designed to build practical skills through 20 percent lecture, 30 percent discussion, and 50 percent skill-building exercises.

The overall focus is divided between developing content and improving delivery skills. Participants receive a comprehensive workshop manual and planning templates, are videotaped, and improve their delivery skills and confidence through constructive coaching.

Through instruction, exercises, and one-on-one coaching, workshop participants will learn the processes, skills, and techniques to:

- Develop a Winning Strategy
- Design a Persuasive Message Using the Oral Proposal Planner
- Develop a Winning Delivery Style
- Prepare to Answer Critical Questions



### Shipley Proposal Guide™

Included with Shipley's *Winning Business* workshops

The **Shipley Proposal Guide™** contains 52 topics and 12 model documents. Each topic section provides a summary of key points.

### Who Should Attend

- Solutions Managers
- Key Program Personnel
- Sales and Marketing Prof.
- Proposal Managers
- Those who develop, present, or critique oral proposals

### Workshop Length

- 2 Days
- 2 Shipley University™ Units

### Workshop Material

- Workshop Manual
- *Shipley Proposal Guide™*

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# Winning *With* Past Performance

## Course Overview

Past Performance is receiving increasing emphasis in government procurements. Will your organization's Past Performance, including performance not cited in your proposal, contribute to a win?

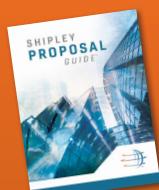
Understanding the make-up of Past Performance information, submittal, and subsequent evaluation is important. A better knowledge of the process and best practices by bidders will lead to lower Past Performance risk and increased win probability. Focusing on Past Performance throughout the business development process improves your win probability and reduces risk.

## Workshop Description

This interactive workshop focuses on the importance of Past Performance as a proposal evaluation factor and how it contributes to a winning proposal.

Through lecture, discussion, and exercises, workshop participants will learn what federal evaluators expect and how those inputs are evaluated.

Participants will also be introduced to best-practice methods that can be applied throughout the business development process to enhance Past Performance submittals.



### Shipley Proposal Guide™

Included with Shipley's Winning Business workshops

The **Shipley Proposal Guide™** contains 52 topics and 12 model documents. Each topic section provides a summary of key points.

### Who Should Attend

- Capture Managers
- Program Managers
- Proposal Managers
- Volume Leads
- Proposal Coordinators

### Workshop Length

- 1 Day
- 1 Shipley University™ Unit

### Workshop Material

- Workshop Manual
- *Shipley Proposal Guide™*

# Winning with Task Orders

Many government agencies frequently use task order contracts to streamline procurement activities while obtaining quality support.

It is critical that your organization meets the range of challenges encountered when bidding task orders, including quick response, high volumes of task orders, limited advance intelligence on upcoming bids, and intense competition.

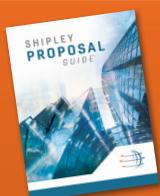
Adjusting your business development process to better fit task order bids will position your organization to win more business and reduce the inefficiencies and pain associated with current task order proposal practices.

Through lecture, discussion, and exercises, workshop participants will learn important distinctions between task order proposals and other proposal forms, and their similarities—enabling participants to make better bid/no-bid decisions, create better-focused proposal strategies, and create more efficient task order proposal response processes. Topics covered include:

- The nature of task order proposals and challenges to winning them
- Increasing your batting average—how to make smart task order bid decisions
- Quick response task orders—essential elements of preparation
- How to tailor your business development process to fit task order bids
- How to best leverage work performed on the contract vehicle proposal and previous task order proposals

## Workshop Description

This interactive workshop introduces key principles and practices for winning task order proposals.



### Shipley Proposal Guide™

Included with Shipley's Winning Business workshops

The **Shipley Proposal Guide™** contains 52 topics and 12 model documents. Each topic section provides a summary of key points.

### Who Should Attend

- Capture Managers
- Program Managers
- Proposal Managers
- Proposal Coordinators

### Workshop Length

- 1 Day
- 1 Shipley University™ Units

### Workshop Material

- Workshop Manual
- *Shipley Proposal Guide™*

# Decision Gates and Reviews

## Course Overview

Your organization can win more business by implementing a disciplined but flexible set of milestone activities phased across the business development lifecycle. Learn to:

- Apply a proven set of decision gates and reviews to define and pursue business opportunities your organization is likely to win and reject those you are likely to lose
- Identify the phases of a standard business development lifecycle and the corresponding decision gates and reviews
- Understand the differences between decision gates and reviews
- Use formal decision gates to make prudent business and strategic decisions, including the allocation or withdrawal of business development resources
- Adopt formal reviews to improve customer focus, clarity of thinking, and effectiveness of your business pursuits

## Workshop Description

This two-day workshop is targeted at individuals responsible for managing or leading key milestones in the business development process. Using lecture, discussion, and hands-on exercises, it demonstrates best practices proven to help organizations win business. In it, you will face a range of common challenges confronted by managers at key decision gates. And, in a case study based on an actual competitive bidding opportunity, you will participate in a series of reviews, following a lead through the business development lifecycle.

After the workshop, you will:

- Understand key decisions on business opportunities and tools needed to support them
- Have experience conducting reviews to improve opportunity pursuits and associated documents, especially proposals
- Be able to adapt new skills and approaches to your organization's needs and markets
- Be equipped for success with over 30 of Shipley's latest business development tools



**Shipley  
Capture Guide™**



**Shipley Business  
Development  
Lifecycle Guide™**

### Who Should Attend

- Corporate Leaders
- Business Development Managers
- Capture/Opportunity/Account Managers
- Proposal Managers
- Business Development Process Designers

### Workshop Length

- 2 Days
- 2 Shipley University™ Units

### Workshop Material

- Workshop Manual
- *Shipley Business Development Lifecycle Guide™*
- *Shipley Capture Guide*
- 34 electronic instruction guides, checklists, review forms, decision aids, and presentation templates

**Workshop Introduction**

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Course Outline.....	3
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**Customer Focus in the Business Development Lifecycle**

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# Blueprint to Winning

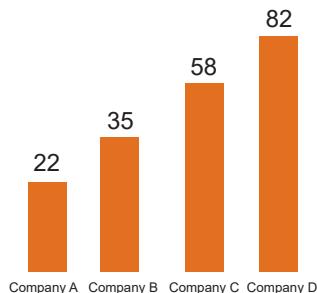
The principles, best practices, and processes of winning are published and available to all competitors. Business development personnel have comparable competencies or can acquire these through easily available training.

Yet some companies consistently outperform others.

Win rates range from the single digits to 80 percent and higher. Why is this?

Shipley's *Blueprint to Winning* addresses this paradox in an intensive 1-day seminar for business development executives or individuals who aspire to be recognized as industry leaders.

Successful participation in this seminar requires total focus. Some things you will learn about your organization and about yourself may be tough to accept. Expect straight talk. Those who take full advantage of this seminar can reasonably expect to increase their win rate by 20-30 percent immediately.



The blueprint for winning, developed with the assistance of your Shipley facilitator, can produce even more significant win rates in the very short term.

## What to Expect in the Seminar

You will leave the session with a practical blueprint for improving your organization's performance and results.

- Understanding the paradox
- Assessing your current business development process
- Developing leadership strategies
- Tailoring a business development process
- Assessing the capability of your staff to execute the process
- Finalizing your immediate, short-term, and long-term plans
- Identifying gaps and enlisting professional support



Shipley's Guidebooks are available for ongoing reference and guidance.

### Who Should Attend

- Senior Executives
- Program Managers
- Capture Managers
- Proposal Managers
- Campaign Managers

### Session Material

- Session Manual
- *Shipley Proposal Guide™*
- *Shipley Capture Guide™*
- *Shipley Business Development Lifecycle Guide™*

**Shipley Blueprint to Winning**

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# Winning Color Team Reviews

## Course Overview

This one-day workshop will help you schedule, plan, and conduct a disciplined but flexible set of color team proposal reviews to improve your probability of winning (Pwin). Using lecture, discussion, and hands-on exercises, you'll learn best practices to help you submit a more compelling and fully compliant proposal. You will receive a full set of tools and checklists to help you plan and execute effective color team reviews.

You will learn to:

- Understand the various color team reviews and their objectives
- Identify key deliverables that result from winning color team reviews
- Use formal color team reviews to ensure compliance, responsiveness, and customer focus.
- Prepare assigned reviewers with necessary tools and guidelines

In the workshop, you will learn about more than 12 useful tools that support proposal development milestone reviews and how to adapt new skills and approaches to your organization's needs and markets.

Examples of reviews we address during the workshop include:

- **Blue Team:** Reviews initial capture strategy and capture plan
- **Black Hat Team:** Predicts competitors' solutions, reviews our solution set, and refines our capture plan
- **Pink Team:** Reviews storyboards and mockups to confirm solution set and to validate proposal strategy
- **Green Team:** Reviews cost/price solution
- **Red Team:** Reviews final proposal draft—including price—to predict how the customer will score the proposal
- **Gold Team:** Approves final proposal and price
- **White Hat Team:** Compiles lessons learned from capture planning through proposal development to contract award



*Shipley  
Capture Guide™*



*Shipley Business  
Development Lifecycle  
Guide™*

### Who Should Attend

- Business Developers
- Capture & Opportunity Managers
- Proposal Managers
- Business Development and Marketing Leaders

### Workshop Length

- 1 Day
- 1 Shipley University™ Unit

### Workshop Material

- Workshop Manual(s)
- Shipley Business Development Lifecycle Guide™
- Color Team Review Tools
- BD, Capture, Sales, and Proposal Documents

**Workshop Introduction**

Course Objectives.....	1
Benefits of This Workshop.....	2
Course Outline.....	3
Workshop Materials and Tools.....	4

**Customer Focus in the Business Development Lifecycle**

Module Objectives.....	5
Benefits of Customer-Focused Processes.....	6
Customer Focus Originates with Understanding of Buying Cycle.....	8
Shipley's Seven-Phase Business Development Process.....	10

**Gates Versus Reviews**

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Characteristics of Gates and Reviews .....	18
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**Color Team Reviews**

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Learn from  
Anywhere



# POWeRful™ Proposal Writing (Live, Online)

## Course Description

Using the proven Shipley process for developing winning proposals, you will plan, write, and revise a proposal section based on a sample Request for Proposal (RFP). Taught from the perspective of a proposal contributor, from receipt of customer requirements to incorporating feedback from reviewers, you will gain insights into techniques, tools, and resources necessary to win. You will learn to:

- Recognize and apply the seven key characteristics of effective proposals
- Leverage the sales or capture team strategies to effectively plan a proposal or section
- Organize the textual and visual content of a proposal or section around a customer's hot buttons and issues
- Write persuasive, succinct, well-organized proposal content and themes
- Use effective examining and revision processes to improve customer focus for higher evaluation scores

You will learn the principles and best practices for proposal writing and practice these skills using proven and flexible Shipley tools and templates.

### Workshop Material

- All course materials will be accessible through ShipleyOnline™
- Each section is based on best practices and topics in the Shipley *Proposal Guide*, v4.1; an electronic copy of this guide will be provided with the course materials
- The sections slides will be downloadable for your use
- Shipley forms and tools will be downloadable for use on exercises and after the training

- 10 APMP CEUs
- Counts as 2 Units toward Shipley University Certification

### Completion Criteria

- Active participation in all live course sessions
- Submission of final exercise
- A minimum score of 70% on the final exam

*"This online training format was exactly what I needed – it taught me proposal best practices, provided reference material and tools, and gave me a chance to practice what I learned and receive feedback. The format was perfect for my busy schedule and training needs."*

*"I especially valued the feedback the instructor provided during the course and after my final submission. I'll be able to apply what I learned immediately on my next proposal."*

Actual comments from ShipleyOnline® participants

# Capturing New Business (Online)

## 1-Day Online Course

An online course to help learners understand the roles, responsibilities, techniques, and tools needed to improve your organization's competitive position before your customer releases a request for proposal.

- Three 1.5 hour lessons
  - Two 1-hour breaks between lessons for completion and submission of exercises
- 

## Course Description

- Recognize the customer buying process
- Understand the roles and responsibilities of capture planning
- Use Pwin (the probability of win) to evaluate factors leading to a bid/no-bid decision
- Select and qualify business opportunities of interest, based on rational criteria
- Develop an action plan for pursuing qualified opportunities

- Make the Interest Decision—Follow a checklist to determine if the opportunity generates enough interest to pursue, based on alignment with your organization's strategic direction
- The Capture Planner—Use an effective tool to gather and track opportunity information

### Break 1: 1-hour to review materials

### Assignment: Use Pwin Calculator to calculate the case study Pwin

### Session 2 (1.5 hours): Capture Planning

#### Lesson 2: Capture Planning

- Understand the Customer—Research the key personnel, decision makers, evaluation process, buying history, and issues regarding the opportunity
- Understand the Competition—Research your competitors' strengths, weaknesses, probable solutions and gaps, and any discriminators
- Make the Pursuit Decision—Follow a checklist to determine if you should pursue the opportunity, based on what you now know, and update your Pwin
- Update the Capture Planner—Add customer and competitor information to your tool

### Pre-Course: Case Study Review

- Review a customer opportunity case study

### Session 1 (1.5 hours): Identifying and Qualifying Opportunities

#### Lesson 1: Identifying and Qualifying Opportunities

- Review Opportunity and Capture Management—Understand roles and responsibilities in the process and learn how to use probability of winning (Pwin) as a measure of whether to pursue a bid or not
- Identify and Qualify an Opportunity—Research the essential elements of an opportunity and prepare to make an informed interest decision

# Managing Strategic Proposals

## 1-Day Online Course

An online course to help learners understand the roles, responsibilities, techniques, and tools needed to manage a strategic sales proposal in any market.

**Pre-Course:** Case Study and Case Study RFP; Demographic survey including a summary of learner course objectives

- Three 1.5 hour lessons with 10-minute break during each lesson
  - Two 1-hour breaks for completion and submission of assignments
- 

## Course Description

- Learn the roles and responsibilities of an effective Proposal Manager
- Understand leadership competencies necessary to be successful
- Learn to develop a comprehensive Proposal Management Plan (PMP)
- Apply outlines, agendas, and tools for managing effective proposal reviews
- Learn to collaborate with all sales/capture team members to produce a winning proposal
- Proposal Manager leadership competencies
- Case Study Review – *Clarify understanding of the opportunity and requirements*
- The Proposal Management Plan – *Know all elements of an effective plan and how to communicate the plan*
  - Purpose of the PMP
  - Managing the Elements of the PMP: Compliance matrix, proposal outline, proposal schedule
- The Proposal Manager Toolkit

### Break 1 – 1 hour

**Assignment:** Create an outline based on the RFP in the case study and the requirements listed in the RFP

### Session 1 (1.5 hours): Managing the Proposal Planning Phase

**Session Objective:** Based on industry best practices, understand the importance of planning and the necessity to develop a comprehensive Proposal Management Plan (PMP).

- The Roles and Responsibilities of an Effective Proposal Manager
- Primary roles and attributes for success

## Lesson 2 (1.5 hours): Planning, Kickoff, and Reviews

**Session Objectives:** Plan for proposal kickoff by establishing win themes and writers' packages.

- Develop win strategies based on sales/capture planning information and assessment
- Know the customer hot buttons and your discriminators
  - Prepare writers' packages for all proposal contributors
- Help shape or create a DRAFT executive summary – understand its purpose
- Prepare for and facilitate a proposal kickoff meeting
- Prepare for and conduct a Pink Team (Review #1) review session
- Validate the bid decision – Are we positioned to win

### Break 2 – 1 hour

**Assignment:** Prepare a kickoff meeting agenda based on the case study and listen to kickoff meeting audio.

## Lesson 3 (1.5 hours): Managing Proposal Development and Post-Submittal Activities

**Session Objective:** Provide leadership at each phase of proposal development and through contract award.

- Review kickoff meeting agendas and best practices
- Common Proposal Manager Challenges – meeting deadlines; teaming requirements
- Conducting daily and ad hoc stand-up status meetings
- Facilitating the Red Team review
- Conducting and applying lessons learned
- Wrap-Up

### Final Assignment: Due in one week

- Create and submit a 30-day response schedule and a compliance matrix
- Final test
- Course evaluation

*Application exercises are part of this online course.*

*Learners are expected complete all exercises within the timeframe of the course schedule.*

### Workshop Material

- All course materials will be accessible through the ShipleyOnline™ LMS
- Each lesson is based on best practices and topics in the Shipley Proposal Guide, v4.1; an electronic copy of this guide will be provided with the course materials
- The lesson slides will be downloadable for your use
- Shipley Proposal Manager Toolkit (MS Office tools)

### Completion Criteria

- Active participation in all 4 live course sessions
- Submission of all quizzes and written assignments
- A minimum score of 70% on the final exam

### Who Should Attend:

- Anyone who is responsible for managing a proposal effort and overseeing proposal contributors



# Shipley Associates

## Self-Paced Learning

Shipley Associates now offers completely self-paced learning modules. eLearning with Shipley requires no fixed schedule. In addition, our eLearning modules provide:

- Reinforcement of key concepts, principles, and best practices taught in Shipley workshops
- Tools and tips for winning more business
- Access to Shipley's best-practice guidebooks for ongoing reference and guidance
- Industry-tested and proven best practices
- Convenient log-in to learning sites wherever you have web access



## Now Available!

Foundations for Proposal Development  
Proposal Kickoff Meetings  
**Identifying Discriminators and Developing Effective Theme Statements**  
Proposal Writing - POWeR™  
Storyboarding and Mockups  
Executive Summary Development

Color Team Reviews  
Proposal Outlining  
Task Order Responses  
Pink Team Review  
Proposal Graphics and Action Captions  
Developing Effective Theme Statements  
Using Discriminators

# Foundations for Proposal Development 2.0

## Self-Paced Course Overview      Description

Whether you are looking to improve your proposal development skills or seeking Foundation Level Certification with the Association of Proposal Management Professionals (APMP), this online self-paced course teaches business development best practices by:

- Teaching you key principles and skills necessary for effective proposal development
- Refreshing your knowledge of proposal development best practices
- Referencing critical information from the APMP Body of Knowledge
- Preparing you for the APMP Foundation Level exam
- Helping you identify gaps in your skills and competencies

This self-paced training is based on the most current APMP competencies (effective May 2016). New topics include: Proposal Reviews, Virtual Proposals, Graphics, and others.

As an APMP Approved Training Organization (ATO) in the U.S. With an APMP Professional Level trainer, Shipley is eminently qualified to offer this online training. This workshop is designed for proposal professionals seeking to win more proposals and coach you to pass the Foundation Level Certification exam offered by APMP.

This online self-paced course addresses the following five key competencies:

- Overview of Process and Sales Methods
- Information Research and Management
- Proposal Planning
- Proposal Development
- Proposal Management

Learn and study on your own time and at your own pace.

Course available to participant 120 days from purchase.



*Shipley's  
Guidebooks  
are available for  
ongoing reference  
and guidance.*



*Shipley is an  
Approved Training  
Organization with  
APMP.*

### Cost

- Shipley Foundation for Proposal Development Online Course: \$299
- APMP's Foundation Level Certification Online Exam\*: \$600 (for non-APMP members) \$400 (for APMP members)

### Materials

- APMP Body of Knowledge—Available online at [apmp.org](http://apmp.org)
- Foundations Study Guide—Available on APMP Store

\* Pricing for APMP's exam is provided here for informational purposes only and is subject to change at any time and without notification. Please contact APMP directly for more information on the exam and pricing, or to schedule an exam.

# Proposal Kickoff Meetings

## Course Overview

Learn best practices for planning, facilitating, or participating in proposal kickoff meetings. The module includes checklists, sample agendas, an overview of roles and responsibilities, and important tips for effective leadership.

Additional topics include:

- Planning your kickoff meeting
- Creating an effective agenda
- Preparing kickoff packages
- Establishing proposal operations guidelines

This module includes short quizzes on each competency area plus a comprehensive test at the end of the course. Students also have access to the *Shipley Proposal Guide* sections to supplement learning and reinforce key best practices.



Shipley's Guidebooks are available for ongoing reference and guidance

## Benefits of Self-Paced Learning

With no fixed schedule and ample time to go back and review topics as needed, our self-paced eLearning offers you an effective use of your time and training investment. In addition, our self-paced modules provide:

- Reinforcement of key concepts, principles, and best practices contained in Shipley training
- Access to Shipley's best practice guidebooks for ongoing reference and guidance
- Industry-tested and proven best practices
- Convenient log-in to learning sites wherever you have web access

### Who Should Attend

- This module is designed for anyone leading or participating in proposal kickoff meetings, including sales professionals, capture leaders, and proposal managers/contributors.

### Cost

- \$89

### Course Subscription

- One year

### Module Length

- Approximately 90 minutes (self-paced)

# Identifying Discriminators *and* Developing Effective Theme Statements

## Course Overview

Identifying powerful discriminators and developing effective theme statements reinforce your message to your customers and demonstrate how you can help them achieve their strategic vision.

Topics include:

- Defining what a discriminator is
- Identifying discriminators that focus on your people, experience, performance, and understanding of the customer's business
- Developing short and concise theme statements (proposal, volume, and section) that tie your unique discriminators to the customer's critical needs

This module includes a short quiz at the end of the course. Students also have access to the *Shipley Proposal Guide* sections to supplement learning and reinforce key best practices.



Shipley's Guidebooks available for ongoing reference and guidance

## Benefits of Self-Paced Learning

With no fixed schedule and ample time to go back and review topics as needed, our self-paced eLearning offers you an effective use of your time and training investment. In addition, our eLearning modules provide:

- Reinforcement of key concepts, principles, and best practices contained in Shipley training
- Access to Shipley's best practice guidebooks for ongoing reference and guidance
- Industry-tested and proven best practices
- Convenient log-in to learning sites wherever you have web access

### Who Should Attend

- This module is designed for proposal contributors.

### Cost

- \$89

### Course Subscription

- One year

### Module Length

- Approximately 45 minutes (self-paced)

# Proposal Writing

## Course Overview

Learn to use POWeR™, a disciplined and repeatable writing process, to develop responsive, compliant, and customer-focused proposals:

- Planning—Develop content; analyze perspective audience
- Organizing—Mirror customer's instructions; use 4-Box template
- Writing—Draft text quickly and efficiently; save time and rework
- Examining—Use peer review to check content, format, and tone
- Revising—Ensure your proposal is clear, concise, and correct

## Benefits of Self-Paced Learning

Topics include:

- Developing content, graphics, and branding that clearly reflect the quality of your organization to the evaluators
- Using POWeR™ to develop proposals that are easy to evaluate and score by the evaluators, increasing winning probability
- Scheduling color team reviews to obtain unbiased views and recommendations for improving proposal content

This module includes a short quiz at the end of the course. Students also have access to the *Shipley Proposal Guide* sections to supplement learning and reinforce key best practices.



Shipley's Guidebooks are available for ongoing reference and guidance.

### Who Should Attend

- This module is designed for proposal contributors.

### Cost

- \$89

### Module Length

- Approximately 45 minutes (self-paced)

# Storyboards and Mockups

## Course Overview

Unclear thinking equals unclear writing. Two powerful planning tools to help proposal writers plan, develop, and review key concepts prior to developing proposal text are storyboards and mockups. The process of using these key management tools reduces rework and improves document quality and WIN probability.

Topics include:

- Using storyboards to develop and review new material
- Using mockups to force writers to focus on the relative importance of topics to the customer and the offer
- Managing the difficult transition from storyboards to mockups to the first draft
- Training proposal writers to develop storyboards and prepare mockups

This module includes a short quiz at the end of the course. Students also have access to the *Shipley Proposal Guide* sections to supplement learning and reinforce key best practices.

## Benefits of Self-paced Learning

With no fixed schedule and ample time to go back and review topics as needed, our self-paced eLearning offers you an effective use of your time and training investment. In addition, our self-paced modules provide:

- Reinforcement of key concepts, principles, and best practices contained in Shipley training
- Access to Shipley's best practice guidebooks for ongoing reference and guidance
- Industry-tested and proven best practices
- Convenient log-in to learning sites wherever you have web access



Shipley's Guidebooks are available for ongoing reference and guidance.

### Who Should Attend

- This module is designed for Proposal Managers and contributors.

### Cost

- \$89

### Course Subscription

- One year

### Module Length

- Approximately 45 minutes (self-paced)

# Executive Summary Development

## Course Overview

Whether you sell to governments or other businesses, offer products or services, work for a large, established organization or a small start-up, *Executive Summary Development* will give you the knowledge and tools to enhance your performance.

*Executive Summary Development* teaches you how to plan and write executive summaries that improve the effectiveness of your proposals and other business development documents by:

- Using principles of customer focus in writing executive summaries
- Writing, organizing, and planning executive summaries using the Shipley Executive Summary Organizer
- Examining and revising draft executive summaries for customer focus, effectiveness, and clarity

This module includes a short quiz at the end of the course. Students also have access to the *Shipley Proposal Guide* sections to supplement learning and reinforce key best practices.

## Benefits of Self-Paced Learning

Topics include:

- Developing content, graphics, and branding that clearly reflect the quality of your organization to the evaluators
- Using POWeR™ to develop proposals that are easy to evaluate and score by the evaluators, increasing the probability of winning
- Scheduling color team reviews to obtain unbiased views and recommendations for improving proposal content



Shipley's Guidebooks are available for ongoing reference and guidance.

### Who Should Attend

- This module is designed for Business Development Managers, Marketing and Sales Managers, Capture Managers, and Proposal Managers.

### Cost

- \$89

### Module Length

- Approximately 45 minutes (self-paced)

# Color Team Reviews

## Course Overview

Many organizations conduct Color Team reviews as part of their business development and proposal processes. These reviews are designed to help select the right opportunities to bid, confirm win strategies, address proposal and performance risk, and support development of high-quality winning proposals. The purpose of Color Team reviews is to:

- Set a standardized process for reviewing business development documents and proposals.
- Obtain unbiased views and constructive recommendations for improvement at each step of the proposal development process.

At a minimum, organizations should conduct:

- Black Hat Review: Predicts competitor solutions
- Pink Team Review: Reviews storyboards and mockups to verify alignment with capture strategy and execution of customer issues

- Red Team Review: Reviews final proposal draft to predict proposal scoring

## Benefits of Online Learning

This interactive workshop introduces workshop participants to nine proven Color Team reviews that have been proven to help offerors increase their win probability on must-win proposals. These reviews and associated topics include:

- Preparing for, performing, and responding to a Color Team review
- Selecting and training appropriate reviewers for each team
- Ensuring reviewers' workloads are balanced
- Implementing the reviewers' comments into final proposal draft



Shipley's Guidebooks are available for ongoing reference and guidance.

### Who Should Attend

- This module is designed for Capture Managers, Proposal Managers, Contracts/Legal, and Management.

### Cost

- \$69

### Module Length

- Approximately 35 minutes (self-paced)

# Pink Team Reviews

## Course Overview

Many organizations conduct Pink Team reviews as part of their business development and proposal processes.

The Pink Team is a review of the storyboards, mockups, or writing plans done before drafting proposal text. The purpose of the Pink Team review is to:

- Validate the detailed proposal content prior to starting the writing effort
  - Compliance and responsiveness
  - Section strategies
  - Benefits and themes
- Review the Proposal Development Worksheet and completed mockups
- Improve the efficiency of the proposal effort in achieving a selling document that implements your overall capture strategy

Pink Team members must thoroughly understand the customer's requirements, the bid request, your win or capture strategy, and the essential elements of preparing compliance checklists, outlines, and response matrices.

## Benefits of Online Learning

Workshop participants learn how to prepare for Pink Team reviews by:

- Defining the purpose, expectations, logistics, methodology, and organization of Pink Team reviews
- Gathering materials needed for Pink Team review, including storyboards, mockups, and copies of the capture and proposal strategies
- Defining Pink Team formats and distributing to writers at the review kickoff meeting
- Consolidating Pink Team comments into a report format for distribution to the proposal team



Shipley's Guidebooks are available for ongoing reference and guidance.

### Who Should Attend

- This module is designed for Capture Managers, Contracts/Legal, and Management Personnel

### Cost

- \$69

### Module Length

- Approximately 35 minutes (self-paced)

# Proposal Outlining

## Course Overview

Developing a proposal outline that addresses customer requirements is a critical activity in the sales and proposal development process. All subsequent work is based on the initial outline. The proposal outline establishes the table of contents, serves as a proposal management tool, and helps writers see their tasks as they relate to the entire proposal. Proposal outlines are important in individual proposal writing efforts and essential in team writing efforts. An effective outline saves time, resources, and energy.

## Workshop Description

This interactive self-paced course introduces participants to sound proposal organizational guidelines, including:

- Remain compliant with the customer's instructions.

- Align the sales message with customer requirements and hot buttons.
- Place information where evaluators and customers with specific duties can easily find it.
- Identify sections in the proposal where the solution can be logically described.

Participants learn guidelines for developing sound proposal outlines based on the principles of customer focus and *good organization*. By following customer's instructions and organization, you demonstrate that you listened to them and are giving them what they requested. By following sound proposal outlining guidelines, you demonstrate your ability to meet the customer's needs in an easy to understand and convincing fashion.

Shipley's proposal outlining SMaRTform makes it easy to follow a structured approach to proposal writing.



Shipley's Guidebooks available for ongoing reference and guidance

### Who Should Attend

- This module is designed for sales professionals, proposal managers, section authors, and other proposal contributors.

### Cost

- \$69

### Module Length

- Approximately 35 minutes (self-paced)

# Tools and Guidebooks

We offer a complete set of tools, reference guides, and templates that allow clients to implement best practices for efficiency and effectiveness. These tools include:

- *Shipley Proposal Guide™*
- *Shipley Capture Guide™*
- *Shipley Business Development Lifecycle Guide™*
- *Shipley Proposal Manager Playbook™*
- *Shipley Capture Manager Playbook™*
- *Shipley Proposal Writer Playbook™*



# Shipley Associates Proposal Guide

The recently released fifth edition of the award-winning *Shipley Proposal Guide* presents updated and additional information about producing winning proposals.

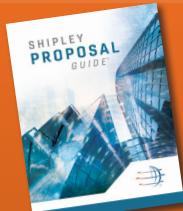
## Updated Sections:

- Proposal Strategy
- Customer Focus
- Outlining
- Proofreading and Revising
- Storyboards and Mockups
- Task Order Proposals
- Grant Proposals
- Active/Passive Voice
- Bid/No-Bid Decisions

- Compliance and Responsiveness
- Page and Document Design
- Virtual Team Management

With over 40,000 copies in circulation, the *Shipley Proposal Guide* has become a must for business development professionals at all levels with best practices covering over 60 communication topics. These best practices are the basis for the Foundation Level APMP (Association of Proposal Management Professionals) Accreditation, offered only through APMP.

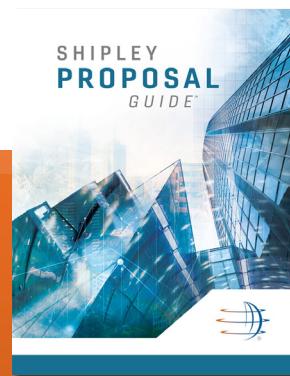
The *Shipley Proposal Guide* is immediately available as part of all Shipley training workshops and for purchase directly from Shipley at [www.shipleywins.com](http://www.shipleywins.com) or by calling 888.772.WINS (9467).



## Shipley Proposal Guide™

Included with Shipley's Winning Business workshops

The *Shipley Proposal Guide*™ contains over 50 topics and dozens of sample documents showing how to apply best practices.



*"Responding to customer RFPs or RFIs is tough. The Shipley Proposal Guide helps us structure a response that is customer focused. There is a wealth of research and best practices in the guide that makes the proposal development process much easier on our sales and business development teams."*

Director, Solution Development Healthcare Management Co.

# Shipley Business Development Lifecycle Guide

Every organization wants to win more business. Shipley's Business Development Lifecycle Guide provides a detailed description of the Shipley seven-phase process. Each phase has defined tasks/activities with pre-determined inputs and outputs. Phases include multiple steps that are separated by decision milestones, which improve capture and win rates.

This hardcopy or online guide contains best practices on each of these critical phases of business development:

- Phase 0: Market Segmentation: Evaluate your marketplace and identify segments of the market in which you want to compete.
- Phase 1: Long-Term Positioning: Identify and understand your marketplace, customers, and competitors and develop plans to build your resources, capabilities, and information bases.

- Phase 2: Opportunity Assessment: Assess current opportunities in the marketplace that match your capabilities.
- Phase 3: Capture/Opportunity Planning: Learn to craft a solution that meets not only the customer's explicit requirements but critical hot buttons as well.
- Phase 4: Proposal Planning: Understand the value of a collaborative relationship with the customer that creates a winning solution that targets the customer's needs.
- Phase 5: Proposal Development: Ensure your proposal is compliant, responsive, strategically sound, consistent among volumes, and produced on time.
- Phase 6: Post-Submittal Activities: Solidify your relationship with the customer and build trust in your ability to provide the services you detailed in your proposal.

Let Shipley be your partner for winning! Visit the Shipley Store for details.



*Shipley Business Development Lifecycle Guide™*

*The Business Development Lifecycle Guide is a comprehensive, baseline lifecycle for competing and winning in strategic markets.*

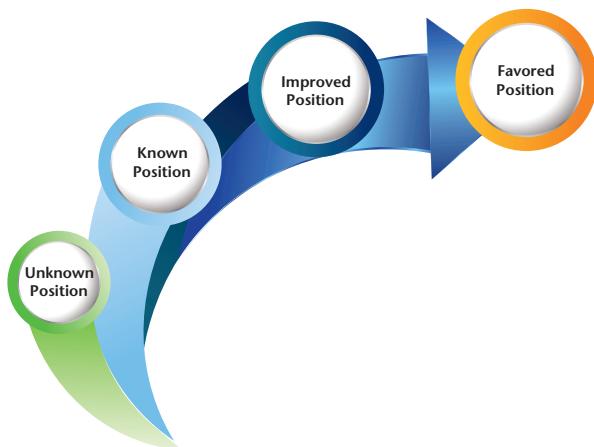


*Now, you can access the best practice framework directly from the web or purchase the hardcopy guide for easy reference.*

# Shipley Associates Capture Guide

Consistently capturing opportunities is vital to any business. The Capture Guide offers specific guidance to business developers to intelligently adapt capture principles to their organizations, selling environments, and competitive business opportunities.

The fundamental capture planning process is an iterative progression that takes a company from an unknown to a favored position with the customer.

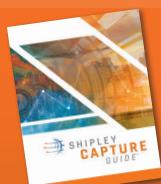


The Capture Guide is designed to be a quick, easy-to-use reference guide for individuals assigned to be capture managers or to contribute to capture teams.

Topics include:

- Capture Team Selection and Management
- Color Team Reviews
- Decision Gate Reviews
- Customer Interface
- Opportunity Qualification
- Supporting the Proposal
- Pricing to Win
- Teaming

Use the *Shipley Capture Guide* to strengthen your capture techniques and help you win more business!



## Shipley Capture Guide™

The Shipley Capture Guide provides tools and templates to help organizations win business in varied selling environments.

Now, you can access Shipley's best capture practices directly from the web or purchase the hardcopy guide for easy reference.

# Shipley Proposal Manager Playbook™

Every Proposal Manager needs a playbook – a framework and necessary tools to manage a complex proposal that is compliant and compelling.

We are pleased to announce the release of the Shipley Proposal Manager Playbook – a step-by-step guide with key tasks, milestones, and tools to help win more business. Over 40 *downloadable tools* are included in the playbook – each a valuable aid to any Proposal Manager facing the challenge of managing people, process, solutions, and sales messaging.

The Playbook is divided into three sections:

- **Proposal Planning** – All the necessary tasks and milestones for leveraging sales and capture activity into the proposal win strategy. Guidance for creating schedules, outlines, compliance and response matrices, and win themes are included in this section.
- **Proposal Development** – Tasks from finalizing teaming agreements to holding daily stand-up, status meetings are included in this section of the Playbook. Also included is step-by-step guidance on incorporating visuals, finalizing the proposal management plan (PMP), reviewing draft content, coaching authors, and facilitating proposal review sessions.
- **Post-Submittal Activities** – Significant attention to key activities and milestones after proposal submission is often the difference between winning and losing. This section of the Playbook gives step-by-step guidance on organizing and recording lessons learned, preparing a transition plan, conducting a white hat, and celebrating a winning effort.

Downloadable tools included with the Playbook:

- Kickoff Meeting tools
- Proposal schedules
- Proposal outline and task tracking tools
- Win strategy templates
- Proposal section planner and organizer
- Color team tools and checklists
- Visuals and production logs
- And over 30 more!

Win more business by making the Playbook work for you!



*The Shipley Proposal Manager Playbook™ includes input from thousands of professionals in dozens of industries and markets, including: business-to-business, business-to-government, international, and non-profit and education.*

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# Shipley Capture Manager Playbook™

Every Capture Manager needs a playbook – a framework and necessary tools to manage a complex proposal that is compliant and compelling.

Winning business in today's competitive markets requires discipline and know-how. Professionals pursuing business in any market segment need to be assertive in understanding and assessing customer needs, competitor positions, and strategic solutions.

The *Shipley Capture Manager Playbook* provides a successive approach and necessary tools for capture or opportunity managers to qualify for and win strategic opportunities. The *Playbook* identifies key milestones and decisions that are necessary to advance the sale and gain a competitive advantage. By applying the key tasks, activities, milestones decisions, and tools found in the *Playbook*, you improve your probability of winning.

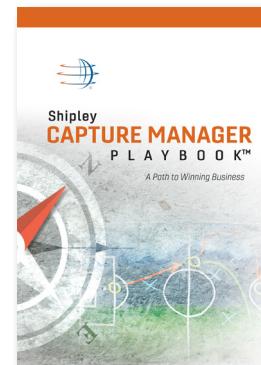
The *Shipley Capture Manager Playbook* is divided into four sections:

- **Opportunity Identification**—Detailed in this section are activities necessary to establish a place in the market, influence potential customers' perceptions, and help prospect for business opportunities.

- **Opportunity Assessment/Qualification**—This section includes tools and milestones to gain knowledge of the opportunity, the customer, and the competitive landscape and decide whether to begin an active pursuit.
- **Opportunity/Capture Planning**—Tasks focusing on preparing and implementing the capture plan and win strategies to influence the customer to prefer your solution are documented in this section.
- **Supporting the Proposal**—This section contains steps the capture manager should take to provide information about the opportunity and the customer to help the proposal team.

Win more business by making the Playbook work for you!

Downloadable tools included!



# Shipley Proposal Writer Playbook™

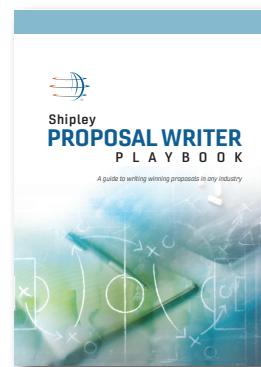
The new *Proposal Writer Playbook* contains best practices to strengthen your writing and help you produce winning proposals in any industry. The *Playbook* includes principles of bid and proposal writing that consistently produce compelling, customer-focused writing. Downloadable tools are also included to support effective proposal development.

Included with the guide are these tools and templates:

- Proposal Section Planner
- Proposal Section Organizer
- Mockup Template
- Proposal Development Worksheet (PDW)
- Four-Box Organizer
- Proposal Outline
- Pink Team Assessment Form
- Pink Team Review Form
- Red Team Review Checklist
- Red team Scoring Guidance
- Red Team Review Form
- Red Team Horizontal Review
- Lessons Learned Review checklist
- Lessons Learned Survey
- White Hat Instruction
- White Hat Planner

Win more business by making the Playbook work for you!

Downloadable tools included!



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