



**Edition for
Opportunity / Capture
Managers**

**APMP Practitioner OTE
Preparation Guide (V 2.3)**

Amendment history

Version 2.1 – Baseline document for Opportunity / Capture program.

Version 2.3 – Amended to include easier to read tables of information in parts of Appendix A

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Objective Test Examination Preparation Guide

Introduction

Thank you for your interest in the APMP's certification program. This guide is designed to provide you with the information that you will need to prepare for and take the APMP Practitioner Objective Test Examination. This guide is not intended to replace the resources you need to prepare for the examination and using this guide does not guarantee that you will pass the examination.

As the name of this level suggests, Practitioner Certification is for experienced practitioners. It validates real-world mastery of industry best practices and the ability to lead others in their use. To achieve Practitioner Certification, you must:

- be APMP members in good standing.
- have at least three years' experience in the capture, sales, bid and/or proposal fields.
- self-certify that you have studied elements of the APMP BoK
- have a sponsor who recommends that you should be considered for the examination

The APMP Practitioner Objective Test Exam assesses the knowledge and skills that demonstrate proficiency in proposal and bid management based on the APMP Competency Framework and Syllabus. It is a challenging exam that tests participants' knowledge based on:

- A provided scenario
- Experience with the APMP approach as supported by the information contained in the APMP Body of Knowledge (BoK)

Whereas the questions in the APMP Foundation Exam are scenario-independent and multiple choice, the questions in the APMP Practitioner OTE require you to provide answers related to the scenario provided.

The questions in the APMP Practitioner OTE are more challenging because they are designed for practitioners with at least 3 years of industry experience in the capture, sales, bid and/or proposal fields.

The correct answers for the exam are supported by the information contained in the APMP Body of Knowledge - the official reference guide for all APMP certification exams.

All examination questions are copyrighted property of APMP. It is forbidden under federal copyright law to copy, reproduce, record, distribute or display these examination questions by any means, in whole or in part. Doing so may subject you to severe civil and criminal penalties and actions by the APMP.

Disclaimer: This guide is intended to provide only a general overview of the topics related to the APMP Practitioner Objective Test Examination. This is not a complete analysis. The information provided is for general use only and is not intended to provide specific advice or recommendations, legal or otherwise, for any individual or organization.

Preparation Checklist

If you **CANNOT** check or complete all the items in the list below, then you may not be ready to take the APMP Practitioner Objective Test Examination. (If you are viewing this guide online only, we suggest that you print this page for your reference.)

Checklist item	Completed (shade %)
. I have read and understood all the elements of this guide:	
a. Sections 1 to 3 – Preparing for and taking the exam. I know how to prepare for an OTE exam.	0% 50% 100%
b. Section 4 - Exam outline. I understand the types of questions that I will be asked to answer.	0% 50% 100%
c. Section 5 – Cross references between the syllabus and the APMP BoK. I have looked through all the relevant sections of the APMP Body of Knowledge and I have completed the self-certification element of my application.	0% 50% 100%
d. Appendix A – Extracts from the Sample Objective Test Examination. I have looked at the Sample Scenario (which is different from the one that I will see in the exam) and believe that I understand the elements that are important. I understand the different types of questions and the rationale for recognizing the correct answers.	0% 50% 100%
e. Appendix B - APMP Industry Glossary of Terms (Version 6). I have looked at the glossary and am sure that I understand the meanings that the APMP gives to the terms that are listed there.	0% 50% 100%
f. I have at least 3 years of experience in the capture, sales, bid and/or proposal fields.	YES ☐
g. I have found my APMP Membership Number. It is	
h. In addition to the activities that the APMP suggests, for my own satisfaction, I plan to:	0% 50% 100%
i. I am committed to taking the time to ensure that I continue to educate myself as an APMP Practitioner and earn the appropriate number of CEUs in the specified period, once I have successfully passed the exam.	YES ☐

Section 1 – About objective test examinations

Objective test exams are different to multiple choice exams

Multiple choice exams test your ability to know and understand facts. Objective test exams are different in style. In an objective test examination, the questions test your ability to apply your knowledge of APMP best practices at two recognized learning levels:

- Learning Level 3: Application of best practices for a given situation within a scenario.
- Learning Level 4: Separation of a complex idea into its constituent parts and an understanding of organization and relationship between the parts. This includes realizing the distinction between hypothesis and fact as well as between relevant and extraneous variables.

The learning levels are defined in Bloom's taxonomy of educational objectives (1956).

Bloom's Taxonomy of Educational Objectives

Bloom's Taxonomy of Educational Objectives is one of the most widely used ways of organizing levels of expertise. Bloom's Taxonomy uses a multi-tiered scale to express the level of expertise required to achieve each measurable student outcome.

There are three taxonomies - knowledge-based goals, skills-based goals and affective goals. Within each taxonomy, levels of expertise are listed in order of increasing complexity. The APMP Practitioner objective test exam uses Bloom's taxonomy of educational objectives for knowledge-based goals.

Question styles used in the examination

In this examination, three question types are used, namely:

- **Classic** – Similar to a standard multiple-choice exam, you are asked to choose one answer from a list of possible answers. There are usually four options, but sometimes there are only three.
- **Multiple Response** – You are asked to choose two correct answers from a list of possible answers. The list contains five options, with two of those options being correct.
- **Assertion Reason** – You are asked to evaluate two statements (an assertion and a reason), to determine if either, both or neither is true and, if both are true, whether the reason explains why the assertion is true.

More detail about these question types and examples of each type of question are provided later in this guide.

Structure of the paper

The exam consists of three parts.

1. The **Scenario** part contains one scenario, providing a description of the customer and the business rationale for the opportunity; the objectives of the opportunity; the bidding organizations and their history with the customer; as well as how they intend to position themselves for the opportunity.
2. The **Questions** part contains six questions, each covering a different syllabus area, which will be clearly identified at the beginning of each question. Each of the six questions contains a number of part questions e.g. A, B or C. Each of the 'part-questions' will identify the portion of the examination points allocated to it. Each part question may have 3, 4, 5 or 6 question lines. Each question line within the part question attracts 1 mark, giving a total of 80 marks.
3. The **Answer** part contains the answer pages on which the answers must be given. There is one answer page for each question (1 to 6). Usually, there will only ever be one answer to each question. However, for multiple response questions two answers are required (this will be clearly stated within the question).

Important note: Whether you are taking the examination online or on paper, it is possible to provide more than one answer to a question. If more than one answer is given, but not required by the question, the response line will be void. If only one answer is given where more than one answer is required, the response line will also be void.

Section 2 – Preparing for the exam

The APMP Practitioner OTE requires that you know factual data and use the information in decision-making and/or apply the information to a situation. **The “factual data” used as the basis for the exam is supported by the information contained in the APMP Body of Knowledge.**

The important topics that candidates should study to prepare for the examination are listed in the cross-reference table included in Section 5 of this guide. This shows which topics within the APMP BoK relate to each syllabus area.

Familiarize yourself with the APMP Body of Knowledge

The correct answers for the exam are supported by the information contained in the APMP Body of Knowledge (BoK) - the official reference guide for all APMP certification exams. Therefore, it is strongly recommended that you take time to familiarize yourself with the information contained within the BoK

Use the sample examination paper to test your knowledge

As you prepare for the APMP Practitioner OTE, you are encouraged to work through **the SAMPLE EXAMINATION PAPER**. The sample paper is fully representative of the paper that you will be taking when you are sitting the exam itself. The syllabus areas are the same. However, the number of part questions in each of the question areas may be different.

Use the sample exam to guide you in identifying any content areas you need extra time and resources to prepare for, and ask yourself these questions:

- Which content areas represent the greatest number of test questions? The greater the number of possible questions on the exam, the more focus you need on these topics to prepare.
- How much time do you need to focus on these areas to prepare for the exam, versus other areas?
- How do your current knowledge and skills compare to the content areas of the exam? Are you strong in some, but weak on others? Making this assessment will help you budget your study time.
- How much training or work have you done in the areas of the exam? If you have had extensive training and/or experience in a specific area, you may decide that your focus should be on the areas that are less familiar to you.

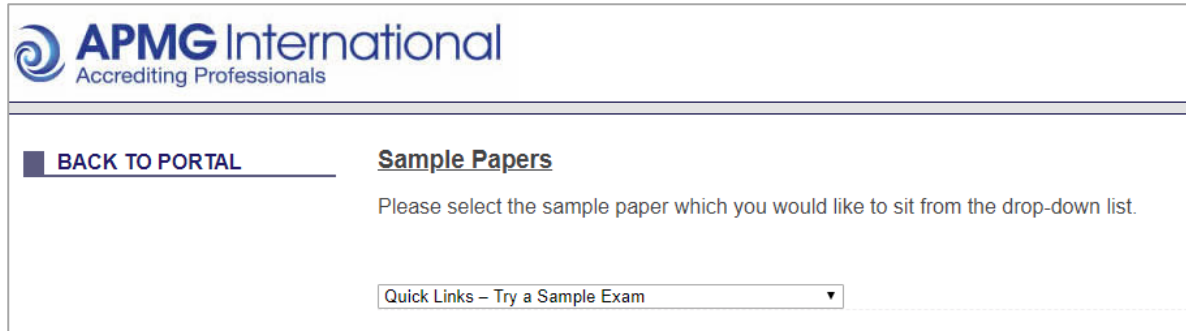
Feedback from the sample exam

When you take the sample exam and submit your answers, **unlike for the live examination**, you receive a score for each of the six questions that you answer. This score will give you an indication of your knowledge of the application of best practices in that topic area.

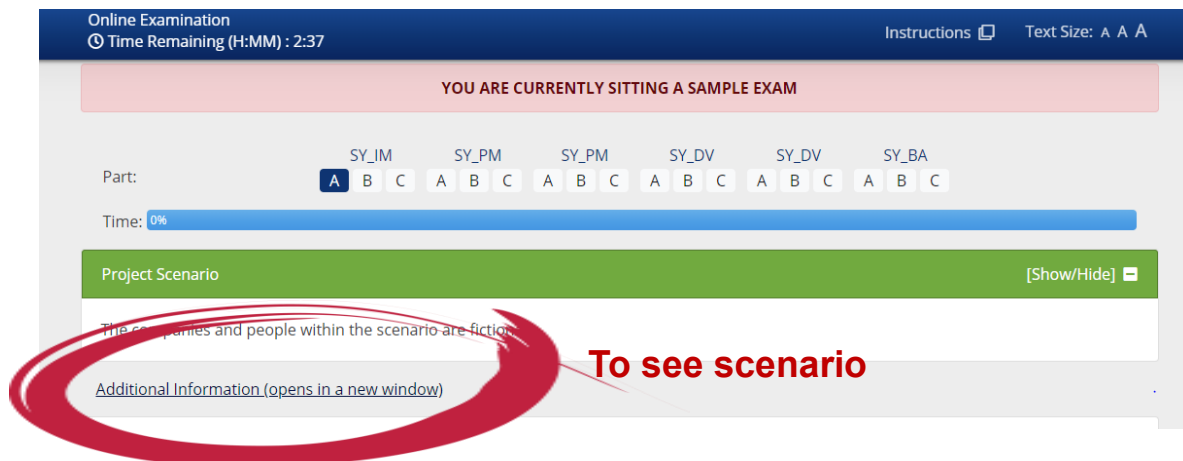
To access the sample exam, go to:

<https://sampleexams.apmg-international.com/Marlin/SamplePapers.aspx>

You should see this screen:



Once you have selected the correct exam, you will go through a number of instructions screens and when you click start, you should get to a screen that looks something like the following. To call up the Scenario, which you should read first, you have to click on the link for Additional Information.



Your analysis of your answers to the questions in the sample paper will help you determine where you need to spend your study time. Eventually you will decide that you have studied all you can. Once you have reached this point, you should schedule an appointment to take the examination.

Section 3 - Registering for and taking the exam

You may register for the exam directly or, if you are taking the exam under the guidance of an ATO, the ATO may have already registered you. If you are registering yourself, you will have to pay for the exam at the point of registration. If you are registering via an ATO, the payment terms are between you and the ATO.

Important note: At the time of registering for the exam, you can select whether English is your native language. If it is not, you may check the box and receive extra time. This is the only time at which you can select this option. If you do not elect to have the extra time at this stage, you will have to re-do the registration process, or seek the assistance of the APM Group to change your registration details.

The steps to registration

1. Before beginning you will need your APMP membership number.
2. Starting from the apmg-international.com website, select the 'Public Exams' option from the 'All APMG platforms' drop-down.
3. The exam you wish to take can be selected from the menu on the left-hand side of the page.
4. Once you are happy you have the correct exam click the 'Book new exam' button. The screen will confirm again which exam you have selected, and then give any Exam Language options within the drop down (English is the only language available at present). Click 'Add Online Exam to Basket':
5. The screen will show the title of the exam and the expiry date for taking it (by default this is one year from the date of booking). Click continue.
6. Please note that the name you use MUST be the same as the name associated with your membership number with APMP (i.e. if you have married/divorced/changed your name by deed poll since becoming a member you MUST either use the name APMP has for you, or request them to update your record with them before continuing).
7. You may use the 'Look up Your Details' option if you have sat other exams through APMG via the Public booking system. Once the system has confirmed your membership you will be able to continue and enter your personal details.
8. The next section requires you to upload your Application and Sponsor details. You will also need to complete the Self-study Declaration and the Data Protection Statement. At the bottom of the Confirmation and Data Protection statement you will find the Terms and Conditions box which MUST be checked. Once checked click 'Continue'.
9. The next page will give you the expiry date and cost of your examination, together with the option to use a voucher code to pay, for it if you have been given one, either by your ATO or APMP. If you do not have a voucher you will need to pay by card or using iDEAL.
10. Once you have either entered and sent a voucher, or completed the card details page, the booking confirmation page will appear:

Should you encounter any problems booking your exam, please contact APMG customer services at:

CustomerService@apmgroup.co.uk / +44 1494 452450

FAQs relating to registration

Here are some common FAQs relating to the registration process:

What do I do to get started?

When you have created an account in the APMG Candidate Portal, registered for your exam and clicked 'Next' on the Exams page you will be presented with a calendar and a list of time slots. Here you can select a date and time for your exam. Click 'Schedule Exam' to book it. If a time slot is greyed out that slot is unavailable. Exam time slots are only available up until the expiry date of your exam.

Will I be sent confirmation of my exam time by email?

No, we recommend that you add your exam time to your calendar using the 'Add to Calendar' option that appears after scheduling your exam.

Can I change my exam time?

Yes, you can click 'Reschedule Exam' shown next to 'Add to Calendar'. If you are taking the exam online, you can reschedule up to 2 hours before the beginning of your exam.

Taking the examination

The APMP expects most candidates to take this examination online. This is the most common approach when taking examinations today. To protect the value of this level of certification, the APMP, working with the APM Group, has elected to ensure that all candidates take the exam under either **Proctor** or **Invigilator** controls.

The role of the proctor, or invigilator is to oversee you while you take the exam and to help ensure the academic integrity of the program.

The invigilator's or proctor's role

The invigilator, or proctor, will keep the official time and ensure that you are given the allotted time for the examination. Within this time, you will be permitted to take a break. If you leave the room to take a break the examination time will not stop. You are not permitted to leave the examination to speak to anyone or make personal calls.

The invigilator, or proctor, may dismiss you from the examination for any of the following reasons:

- If your admission to the examination is unauthorized
- If you create a disturbance or give or receive help
- If you attempt to remove examination materials or notes from the testing room
- If you attempt to take the examination for someone else
- If you have in your possession any prohibited item
- If you exhibit behavior consistent with memorization or copying of examination items

Ways in which the exam can be taken

There are a number of ways in which you may take the examination. The choice of way may be yours or that of your employing organization. They are:

- Online examination under the control of a proctor
- Online examination under the control of an invigilator
- Paper-based examination under the control of an invigilator

If you are using a system the does not allow a proctor to connect with your machine, you make approach APMP or APMG to arrange for a suitable local invigilator.

Online examination under the control of a proctor

When getting ready to take the exam, you should allow time for set up with the examination proctor. The APMP & APM Group have chosen to use a service called “ProctorU” to support this exam.

Here are some common FAQs relating to the examination and the role of the proctor.

What is ProctorU?

ProctorU is a live remote proctoring service that allows you to take your exam online while ensuring the integrity of the exam.

What will be downloaded to my computer?

ProctorU use Support-LogMeIn Rescue software, which is a common, trusted remote control software. Details can be found - <https://secure.logmein.com>. This will not install anything onto your computer such as viruses or malware. A security prompt will appear on your desktop advising you of any additional software downloads.

What do I need to have with me on the day of my exam?

You need to bring a form of photo ID (i.e. driver's license, passport, etc.) to show to your proctor and any materials authorized for the exam. Bring a reflective surface (e.g. a mirror or smartphone) to show the proctor your screen if you have a built-in webcam.

What do I do at the time of my exam?

Log into the Candidate Portal click 'Next' and click 'Connect to your Proctor' when highlighted after the countdown has completed. Follow the instructions onscreen to connect to the Proctor.

How do I know if my computer is compatible with ProctorU?

Before you enter your exam, you need to 'Test your equipment', you can do this by clicking 'Test your equipment' located under 'Prepare for your exam'. This will check that you have the following:

- Webcam
- Microphone
- Required ports open (If you're in an office, ports might be blocked by your IT Dept.)
- Acceptable bandwidth

- Supported Adobe Flash
- Supported Operating System

If you have any errors you can connect to a live person from ProctorU, just fill out the form and click 'Connect to a live person'. Use 'APMG International' as your institution. Further down the page you can find related FAQs. Please also ensure you meet ProctorU Technical Requirements by reviewing them here - <https://www.proctoru.com/tech.php>.

What should I expect on the day of my exam?

After clicking 'Connect to your Proctor' you will need to:

- Agree to be recorded – Click 'Ok'
- Allow access to your webcam and microphone - Click 'Allow'
- Download the LogMeIn software – 'Click to Download'
- Run the software – The downloaded software should be shown at the bottom left of the web browser you are using. If you cannot find this, go to your 'downloads' folder
- Accept the ProctorU notification – Click 'Ok'

On completion of these steps you will be connected to your proctor and you should be able to see and hear them. If you cannot see or hear your proctor, they will try to resolve this issue for you. If the proctor is happy that he/she can see your work area you may continue with the exam process via the chat window.

The proctor will:

- Take control of your computer
- Validate your identity – using one form of formal identity such as a passport, identity card or driving license
- Check your environment – using a basic room scan using your webcam or smartphone
- Check that your computer meets the required exam conditions

At what time should I arrive for my exam?

Arrive for your exam at the time of your appointment, or just before. You will have 10 minutes after your appointment to connect to your proctor. If you miss your appointment you will need to reschedule.

My exam has a time limit. Does that time start as soon as I connect to the proctor?

No. The timer for your exam starts when the exam has been opened and your first question is visible. Please ensure any special requirements were requested on the initial booking as ProctorU are unable to add any additional time for these requirements at the time of sitting the exam.

Will the proctor be able to access my computer files without my knowledge?

No, the Proctor cannot access your computer files without your knowledge. Proctors can view the screen, move the mouse and control the keyboard as if they were sitting next to you. The Proctors actions are shown and logged in the chat window. The entire session log is reviewed and saved. There is a permanent record of what actions the proctor took while accessing your computer.

Online examination under the control of an invigilator

When getting ready to take the exam, you should allow time for set up with the examination Invigilator. The invigilator must have been pre-approved to fulfil this role at least 36 hours prior to the time that you plan to take the exam.

Here are some common FAQs relating to the examination and the role of the invigilator.

Who is acceptable as an invigilator?

An invigilator is a person that has been pre-approved by APM Group International, to undertake the role that allows you to take your exam online while ensuring the integrity of the exam. They may be sponsored directly by APM Group or via an ATO.

At what time should I arrive for my exam?

Arrive for your exam at the time of your appointment, or just before. You will have 10 minutes after your appointed time to set up your system to take the exam. If you miss your appointment you will need to reschedule.

My exam has a time limit. Does that time start as soon as I arrive at the exam room?

No. The timer for your exam starts when the exam has been opened and your first question is visible. Please ensure any special requirements were requested on the initial booking as invigilators are unable to add any additional time for these requirements at the time of sitting the exam.

Paper-based examination under the control of an invigilator

Important note: Paper-based examination answer papers must be returned to APM Group to be scored. The invigilator will not have the information to allow them to score the answer sheets. As a result, if you elect to take the exam this way, you will not know your result immediately.

The invigilator will be sent the exam paper related information 36 hours prior to the planned exam time slot.

An invigilator is a person that has been pre-approved by APM Group International, to undertake the role that allows you to take your exam online while ensuring the integrity of the exam. They may be sponsored directly by APM Group or via an ATO.

At what time should I arrive for my exam?

Arrive for your exam at the time of your appointment, or just before. You will have 10 minutes after your appointed time to complete the forms needed to be associated with the exam. If you miss your appointment you will need to reschedule.

My exam has a time limit. Does that time start as soon as I arrive at the exam room?

No. The timer for your exam starts when the exam has been opened and your first question is visible. Please ensure any special requirements were requested on the initial booking as invigilators are not permitted to add any additional time for these requirements at the time of sitting the exam.

FAQs relating to the examination, all formats

Are breaks allowed during my exam?

Yes, you are allowed a total of 10 minutes break during the exam. It is recommended that you plan this to be in 2 x 5-minute slots. **These 10 minutes are added to your total exam time.**

What if I miss my exam slot?

If you are using the ProctorU service, the proctor will try to contact you. If they are unsuccessful, you will be marked as a “No Show” and you will have to reschedule your exam.

How do I know if my computer is compatible with the APMG online exam website?

We recommend that you try a sample exam by either clicking ‘Sample Exams’ under further resources in the candidate portal and select a sample exam. If you experience any problems with our sample exams please contact the APMG Technical Helpdesk at <https://candidateportal.apmginternational.com/#/contact>, who will be able assist you in preparation for your exam.

Can I use a wireless connection?

We strongly advise against using a wireless connection due to wireless fluctuations. The fluctuations could disconnect you from the exam and Proctor. The exam timer will keep running and you risk having your exam voided. If any problems occur due to a wireless connection, you are not entitled to a free re-sit. Use wireless at your own risk.

Can I use multiple screens?

You are able to use up to two screens, if that is your preferred method of working.

What information am I allowed to access during the exam?

This is an open-book examination. You are able to access the APMP BoK (using the following URL: <https://www.apmp.org/general/custom.asp?page=BOK>), as well as use a printed, or online, version of this guide, which includes the Industry Glossary, as reference material. You may also have reference to printed sections of the APMP BoK, if you find it easier to work that way.

Can I take notes during the exam?

You are permitted to make notes on paper or in notebooks and carry out any workings necessary to answer the examination questions. You are reminded that the examination questions are copyrighted property of APMP. It is forbidden under federal copyright law to copy, reproduce, record, distribute or display these examination questions by any means, in whole or in part.

Can I read the questions out loud?

You are permitted to read the questions out loud to yourself, to enhance comprehension. However, in the event that you are taking the exam online, under the control of a proctor, it is at the proctor's discretion to decide whether you are reading a question out loud, or talking to a second person and act accordingly.

Are there any other exam conditions that I should be aware of?

Some information regarding the exam conditions is listed below:

- Only have authorized materials relating to the exam in your work area
- Try to take the exam in quiet spot, in a well-lit room
- No-one else can be in the room unless previously agreed with APMG and ProctorU – If someone enters unexpectedly you can let them know that you are in an exam and that they must leave. You may not have a full conversation with them as this risks your exam being voided.
- Turn off all unnecessary mobile devices (smartphones, tablets, etc.)

General strategies for taking the exam

Sitting the exam

Plan some time prior to taking the exam (15-30 minutes) for setting up, registration and processing.

Before you begin to consider answering the exam, read all directions carefully. Be sure of exactly what you have to do. Read the scenario carefully (allow 10-20 minutes) before you attempt any answer.

Read and follow the instructions carefully. Ask the invigilator, or proctor, for clarification if you are not sure about the instructions. Remember, the proctors will not answer questions related to exam content.

Read each question carefully

As for all objective tests the wording of the question and potential answers can be tricky. Each word is important so it's vital to read and thoroughly understand each question and the various responses to it. Consider all the options before choosing your answer, even if the first option seems correct. This is important when you are instructed to choose the 'best' or 'most correct' answer in the exam.

Take special note of phrasing, such as:

- Negative phrases (e.g. Choose the answer which DOESN'T describe).
- Subjective questions (e.g. Choose the option that BEST describes).
- Judgement questions (e.g. Choose the MOST CORRECT answer).
- Multiple answers (e.g. Choose MORE than one).
- Read the question whilst covering the choices provided with your hand. Try to answer the question yourself THEN read through the choices. Doing this allows you to make a more accurate choice.

Accept the questions at face value

- Read the questions (and the language used) carefully, but don't assume they contain any 'tricks'. Reading too much into a question usually results in a wrong answer.
- Don't leave any questions unanswered. There is no penalty for incorrect answers.
- Be alert for grammatical inconsistencies between the question and the potential answer. A choice is nearly always wrong if the question and the answer don't combine to make a grammatically correct sentence.

Do not change your original answer

In most cases your instincts will be correct. Only change your answer if you have a very strong belief that it's wrong, you find new evidence, or you suddenly remember otherwise.

If you get really stuck ...

Narrow your choice down to which of the answer options is most likely to be correct. This helps you take your 'best guess'.

- Use a process of elimination. Multiple choice questions usually contain one or two answer options that are obviously incorrect. Eliminate these first. If you still need to guess the correct answer from the remaining options, you will have a better chance of getting it right.
- Rule out options that are completely unfamiliar to you, especially if they use unfamiliar vocabulary terminology or concepts not contained in the APMP BoK.
- Eliminate options that contain exact or absolute words. Words like always, every, never mean that there is no exception. Therefore, if you can think of one exception, statements that include these words are incorrect or false. Favor options that contain qualifiers (mostly, sometimes, rarely, seldom).
- For number answers, avoid extremes and favor options in the middle-range.
- Consider look-alike options carefully. If two of the alternatives are similar, one is likely to be correct; choose the best but eliminate choices that mean basically the same thing, and thus cancel each other out.

Strategies for analysis of an exam question

The questions on the exam vary in complexity. Some questions ask you to recall information and some questions require you to apply knowledge in order to select the most appropriate response or action given the situation in the scenario.

When responding to each question, you should always select the option which is supported by the APMP BoK. You should also pay close attention the content of the scenario; to determine what the question is truly asking, since the question may be asking what **MUST** be done or what is **MOST** commonly done vs. what can be done.

Each question on the exam is written so that all answers are plausible. If this was not the case, and the incorrect answers were implausible, then your knowledge and experience would not be effectively measured. The exam does not use “trick” questions. Instead, you must either know the answer or be able to effectively manipulate the information in a decision-making process to choose the right answer.

All questions and answers are referenced to the APMP BoK. Each question has been reviewed by a number of experienced professionals in the field who agree on the correct answer. In addition, empirical data has been collected on each question to assure that it performs appropriately and effectively. The answers presented may not agree with your individual interpretation of the case study scenario. Regardless, it will be necessary to choose one of the answers provided as the best answer.

About the scenario and exam questions

- Uses of “should”, “will” and “must”.
 - “should” - is used to express “obligation”: something that is good or important or recommended. It is less strong than must and is used to test whether something should be done in a scenario situation because it is consistent with the principles and recommended practices of APMP.
 - “must” is used when talking about something that is “necessary” or “has” to occur, i.e. something that is mandatory.
 - “will” and “is” however, are used to express something definite or indisputable.
- Facts that relate to the APMP defined best practices that are being tested.
 - to describe generic facts about the APMP concepts, processes, and principles
 - facts that are documented in the APMP Body of Knowledge.

Time management

Candidates must manage their time in order to complete all questions.

Candidates who have English as a 1st language

For those candidates who have English as a first language, the examination is 150 minutes in duration.

Candidates who **DO NOT** have English as a 1st language

For those candidates who do not have English as a first language, the examination is 185 minutes in duration.

Candidates requiring special consideration

For those candidates requiring special consideration, they should communicate with the APM Group directly and appropriate arrangements will be made.

Using the time during the exam

As a general guide, candidates may wish to spend the first 10 -15 minutes reading the scenario information and getting familiar with the layout of the paper.

This would allow 20 minutes to be allocated for each of the six questions, leaving 15 - 20 minutes tolerance for additional reading required for some questions.

This suggested timing is for guidance only.

It is expected that some questions may take longer to answer than others due to the question styles and use of additional information.

Access to other materials during the examination

Reference to the APMP Body of Knowledge and this guide is permitted during the exam. Your own personal notes are permitted to be used.

Candidates should be aware of the time constraint upon them. Whilst the APMP body of Knowledge is there for support, as in real life, the time pressure of the exam means that the questions have not been designed on the basis that candidates are required or even expected to refer to it to answer the questions.

Its use is 'optional'. As a guide, a candidate might check the APMP Body of Knowledge once or twice in an exam for a specific point, but any more than that is likely to be counter-productive and is not advised.

Maintaining your certification level

The APMP Certification for Practitioner Qualification will remain valid as long as the candidate records ongoing Professional Development in their Personal profile CPD record on the APMP website.

All successful candidates must record a minimum of 40 Continuing Education Units in every 24-month period following their qualification. A list of the activities that qualify for Continuing Education Units and the number of Units applicable to the activities can be found on the APMP website www.apmp.org.

Section 4 – Question types

Types of question

There are three different types of question used within the paper. The following shows you the structure of each type of question.

Without having read the Scenario, the answers will not mean anything to you at this time. In Appendix A to this guide, you will be able to see these example questions – taken from the Sample Examination Paper – and have the opportunity to work out the correct answers, as well as be given the information needed to understand why any individual answer is correct.

1. Classic – ‘choose one from a list of possible options’. The correct response is to be selected from a list of 3 or 4 options.

Using the Scenario, answer the following questions about Capture Planning and Scheduling for the PTA opportunity.

Decide whether the approach taken is suitable and select the response that supports your decision.

- | | |
|----------|---|
| 1 | <p>The TECHY Capture Manager has decided to develop the Capture Plan as a PowerPoint presentation to enable fast and collaborative development.</p> <p>What change, if any, is most appropriate for the TECHY Capture Manager to make?</p> <ul style="list-style-type: none"> A No change, because a Capture Plan should only record high-level information, the detail can be discussed. B No change because each Capture team member should keep their own record of assigned actions, customer interactions and outcomes. C Change because a PowerPoint Capture Plan will only show high level information and links to any additional information or supporting files. D Change because a Capture Plan that has been used for a similar customer with similar requirements should be used to reduce effort. |
|----------|---|

2. Multiple Response – ‘choose 2 correct options from a list of 5 options’.

This question follows the same format as the ‘Classic style’, but more than one answer is required.

It is the only question type that requires more than one response to gain a mark. Both responses must be correct to gain a mark. If more or fewer than 2 responses are given, then the answer will be void.

Using the Scenario, answer the following questions about Capture Planning and Scheduling for the PTA opportunity. The TECHY Capture Manager is developing the Capture Schedule and Plan. Remember to select 2 answers to each question.	
1	Which 2 considerations are most important for the Capture Manager? A Final approval of the Capture Schedule with the senior stakeholders should take place following clarification of requirements and discussion of the outline technical solution in weeks 18-20 with the PTA. B To avoid unnecessary rework, development of the capture strategy should be scheduled to begin after the PTA meeting in week 44. C Time should be built into the schedule to review and update the Capture Schedule to accommodate a changing competitive landscape. D Initial value propositions should be developed and tested with PTA during the clarification of requirements and discussion of outline technical solutions in weeks 18-20. E Price-to-Win development should be scheduled to begin in week 32 and be completed by week 36.

3. Assertion Reason – ‘evaluate two statements (an assertion and a reason), to determine if either, both or neither is true and, if both are true, whether the reason explains why the assertion is true’. There is only one correct response to each question, but options can be used once, more than once or not at all.

If either statement is false, the answer is selected from options C, D or E. If both statements are true, a third step is required. If the reason explains why the assertion is true, the answer is A. If it does not, the answer is B.

Using the Scenario, answer the following questions about Developing and Managing Tactics for the PTA opportunity.

Lines 1 to 3 in the table below consist of an assertion statement and a reason statement. For each line identify the appropriate option, from options A to E, that applies. Each option can be used once, more than once or not at all.

Option	Assertion	Reason
A	True	True AND the reason explains the assertion
B	True	True BUT the reason does not explain the assertion
C	True	False
D	False	True
E	False	False

	Assertion		Reason
1	TECHY should discover the business outcomes the PTA want to achieve from a teaming partnership.	BECAUSE	Trust between a buyer and seller takes time to establish.
2	TECHY should first consider partnering with an organization they have previously worked with.	BECAUSE	Performing due diligence on teaming partners is critical.
3	The Bidder Comparison Matrix shows that TECHY has the full capability to deliver the PTA solution; however, they should still consider teaming.	BECAUSE	Customers dislike teammates whose primary motivation is to reliably secure a share of the work without competition.

Section 5 – Cross references between the syllabus and the APMP BoK

The following table provides a cross reference list between the syllabus topics being tested in the APMP Practitioner OTE.

It has been included to allow you to understand the competence areas that are to be tested in the examination and which section to study in the APMP BoK to assure yourself that you understand the “factual data” used as the basis for the exam. The syllabus areas are listed on the left and the relevant APMP BoK section listed on the right.

Syllabus area	APMP BoK topic
Opportunity Capture Planning and Scheduling	
Demonstrate knowledge of an opportunity capture plan discipline to capture new business more efficiently	Opportunity capture planning and scheduling
Develop structured opportunity capture plans that include external analysis, internal analysis, strategy development, and execution and monitoring	Opportunity capture planning and scheduling
Use an appropriate medium to develop; review, share, and update opportunity capture plans.	Opportunity capture planning and scheduling
Maintain an opportunity capture process that is dynamic, flexible, interactive and current	Opportunity capture planning and scheduling
Develop a schedule of opportunity capture activities using scheduling tools.	Opportunity capture planning and scheduling Scheduling
Plan regular decision gate reviews to determine whether to advance the opportunity capture to the next phase or end the pursuit	Opportunity capture planning and scheduling Gate Decisions
Schedule reviews to improve the opportunity capture plan, strategy, proposal, or lessons learned	Opportunity capture planning and scheduling Reviews
Use the opportunity capture plan outputs to begin the proposal planning process	Opportunity capture planning and scheduling Linking opportunity capture plans to proposal content
Demonstrate knowledge of an opportunity capture plan discipline to capture new business more efficiently	Opportunity capture planning and scheduling

Syllabus area	APMP BoK topic
Create, align and adapt the opportunity capture schedule to match, the customers actions, the organization's business development process, the resources available, and the selling environment	Opportunity capture planning and scheduling End to End Process Scheduling
Opportunity capture team selection and management	
Identify and commit the right people to the Opportunity capture team	Opportunity capture team selection and management
Engage senior leadership to commit the required resources	Opportunity capture team selection and management
Train the Opportunity capture team in the process that will be followed	Opportunity capture team selection and management
Arrange and manage the kick-off meeting to start the Opportunity capture process	Opportunity capture team selection and management
Assign, SMART objectives, and completion dates to named individuals within the opportunity capture team, providing clear reporting expectations	Opportunity capture team selection and management
Engage senior management keeping them informed and involved	Opportunity capture team selection and management
Use objective measures to evaluate opportunity capture success	Opportunity capture team selection and management Stakeholder Engagement and Management
Review Management	
Define the organization's process phases, gate milestones, and review points to support a specific capture	Review Management
Use the Opportunity Capture Plan Review to review the Opportunity Capture Plan and validate the win strategy	Review Management
Use a Competitor Strategy Review to anticipate competitors' likely strategies and solutions and update the win strategy	Review Management
Use the Proposal Strategy or Content Plan Review to validate that the opportunity capture plan outputs have been successfully transferred to proposal strategy and verify compliance	Review Management

Syllabus area	APMP BoK topic
Use the Final Document Review to evaluate the proposal for customer focus, completeness and clear communication of the win strategy and solution	Review Management
Use the Business Case or Senior Management Review to confirm the offer entails acceptable profit and risk	Review Management
Use the Lessons Learned Review to determine how the process, strategies, and talent can be improved	Review Management
Use a consistent process for each review	Review Management
Communicate clear review assignments, balancing each reviewer's workload	Review Management
Select appropriate reviewers for each review task	Review Management
Customer focused opportunity capture skills	
Apply appropriate opportunity capture processes to customers different buying patterns	End to End Buying Process Customer focused opportunity capture skills and tactics
Define and articulate benefits that map to customer issues throughout the buying cycle	Customer focused opportunity capture skills and tactics Value propositions Developing a business case
Use a variety of techniques to anticipate and handle objections throughout the opportunity capture process	Customer focused opportunity capture skills and tactics
Test the potential solution with the customer early and often	Customer focused opportunity capture skills and tactics
Develop a logical business case that supports the customer in making logical buying recommendations	Customer focused opportunity capture skills and tactics Developing a business case
Gate Decision Management	
Manage decision gates at process milestones	Gate Decisions
Develop and communicate the required inputs and written outputs for each decision gate including securing adequate funding and resources when advancing	Gate Decisions Budgets Developing the Solution Cost
Engage the appropriate decision-makers and significant contributors for the decision gate	Gate Decisions

Syllabus area	APMP BoK topic
Provide objective reasoning to end opportunity capture activity if the decision gate information lacks clarity and / or if the opportunity capture team does not know if, how, where, or when the information can be obtained	Gate Decisions
Update the opportunity capture plan and ensure gate decision packages are archived with lessons learned	Gate Decisions Lessons Learned Analysis and Management
Engaging Program Support	
Engage Senior Managers to appoint the program manager immediately after the Pursuit Gate Review	Engaging Program Support in the Opportunity Capture Process
Develop the opportunity capture strategy collaboratively with the Program Manager	Engaging Program Support in the Opportunity Capture Process
Coach the program Manager to lead or support the development of the solution performance work statements, make/buy and work share plans, work breakdown structure, program plan, transition plan, program schedules, costing, and price-to-win analysis	Engaging Program Support in the Opportunity Capture Process Developing the solution cost Price to win Managing Internal Risk Managing External Risk
Coach the Program Manager to develop a baseline solution presentation for the proposal kick-off meeting	Engaging Program Support in the Opportunity Capture Process
Coach the Program Manager to ensure that the solution is continually aligned with the evolving strategy	Engaging Program Support in the Opportunity Capture Process
Prepare, or, delegate the preparation of, detailed, transition and internal program management plans	Engaging Program Support in the Opportunity Capture Process
Use the Opportunity capture Schedule to impose the solution freeze	Engaging Program Support in the Opportunity Capture Process
Coach the program manager for the final presentation	Engaging Program Support in the Opportunity Capture Process
Formally transition program responsibility from the Opportunity capture manager to the program manager upon contract award	Engaging Program Support in the Opportunity Capture Process
Engaging Bid support	
Work with the Bid Manager to prepare detailed proposal budget	Scheduling Budgets

Syllabus area	APMP BoK topic
Extend the opportunity capture strategy into the proposal strategy and conduct Opportunity Strategy Review	Develop Opportunity Capture Strategy Strategy Linking Opportunity capture plans to proposal content Reviews
Integrate proposal support, program management, engineering, and key teaming partners in proposal planning, solution development, work share, WBS development, and price-to-win (PTW) activities	Opportunity capture team selection and management
Influence the selection of the best proposal team members	Engaging and Managing Bid support
Provide support during the proposal kick-off meeting	Opportunity capture team selection and management Kick Off Meetings
Define and manage contacts with the customer, including bidder's conferences, site visits, and questions regarding solicitation documents	Customer focused opportunity capture skills
Analyze the final bid request and lead the Bid Validation gate decision	Gate Decisions
Lead, guide, or contribute to post bid submittal interactions with the customer, including questions, clarifications, contract negotiations, proposal debrief, and program start-up	Opportunity capture team selection and management Negotiations, Managing customer questions Reviews
Drafting the Executive Summary	
Work with sales to ensure the development of key elements of the Executive Summary.	Executive Summaries
Use the draft Executive Summary as a briefing tool.	Executive Summaries
Engage Senior Managers to review the draft Executive Summary	Executive Summaries
Price to Win	
Analyze the options for any price-capability trade-off and pricing alternatives	Price to Win
Analyze the customer's budget, funding profile, and acceptable price range	Price to Win

Syllabus area	APMP BoK topic
Analyze and estimate the lowest-cost, acceptably compliant solution	Price to Win
Analyze and estimate the capability-satisfied solution	Price to Win
Analyze and estimate the value-driven solution	Price to Win
Use analyses and estimation results to determine the Price-to-Win	Price to Win
Prepare, review and implement a win strategy that integrates solution and Price to Win	Price to Win
Differentiate and communicate cost, price and value	Price to Win
Develop should-costs early	Price to Win
Develop objective evidence and rationale to minimize negotiated price reductions that may be requested	Price to Win Negotiations
Strategy	
Distinguish and apply 'strategy' at different phases of the business development process	Develop Opportunity Capture Strategy
Analyze the customer, the competitor and the organization capability using standard, universally understood, integrated and accepted tools	Develop Opportunity Capture Strategy
Define a specific sales Opportunity Capture objective after the pursuit decision to better focus on that unique opportunity capture	Develop Opportunity Capture Strategy
Identify the customers buyers, and list their individual issues	Develop Opportunity Capture Strategy Stakeholder Engagement and Management
Use consistent tools to arrive at a competitive solution that is aligned with the customer's issues and requirements	Develop Opportunity Capture Strategy
Develop a Bidder Comparison Chart to analyze how the customer organization perceives the organization versus the competitors in relation to key issues	Develop Opportunity Capture Strategy Customer and Competitor Intelligence
Develop specific strategy statements that define specific actions, and show both what will be done and how it will be implemented	Develop Opportunity Capture Strategy Strategy

Syllabus area	APMP BoK topic
Develop specific value propositions for each customer stakeholder for the opportunity capture	Develop Opportunity Capture Strategy Value Propositions Develop a Business Case
Create a price to win strategy to drive the solution development	Develop Opportunity Capture Strategy Price to Win
Use trade-offs to validate the opportunity capture approach and ghost the competition	Develop Opportunity Capture Strategy Price to Win
Implement and manage the strategy action plans	Develop Opportunity Capture Strategy Opportunity Capture Plan Development
Teaming	
Identify teaming partners early in the opportunity capture process	Customer and Competitor Intelligence Develop Opportunity Capture Strategy Teaming
Develop selection criteria for teaming using the Bidders Comparison Chart to analyze potential teaming combinations	Customer and Competitor Intelligence Develop Opportunity Capture Strategy Teaming
Negotiate a common vision as the basis for teaming and agree the written teaming agreement	Develop Opportunity Capture Strategy Teaming Negotiation
Consult with customers and consider their preferences in team formation	Develop Opportunity Capture Strategy Teaming
Define each teaming partner's work share in a Work Breakdown Structure (WBS)	Develop Opportunity Capture Strategy Teaming
Presentations and Persuasive Communications	
Prepare a presentation schedule that includes all the activities required to develop messages,; prepare materials, rehearse and select a venue etc.	Developing and Delivering Presentations Persuasion Persuasive Writing, Negotiation Customer focused opportunity capture skills and tactics

Syllabus area	APMP BoK topic
Develop slides that are audience focused and compliment verbal messages rather than duplicate.	Developing and Delivering Presentations Persuasion Persuasive Writing, Negotiation
Build a compelling argument that is presented it in the right order for the customer	Developing and Delivering Presentations Persuasion Persuasive Writing, Negotiation Customer focused opportunity capture skills and tactics
Structure a presentation so that the key points are persuasive, memorable and to which the customer can instantly relate	Developing and Delivering Presentations Persuasion Persuasive Writing, Negotiation Customer focused opportunity capture skills and tactics
Create visuals that are appealing to the audience.	Developing and Delivering Presentations Persuasion Persuasive Writing, Negotiation Graphics
Competently edit own and other's visuals to transform effectiveness	Developing and Delivering Presentations Persuasion Persuasive Writing, Negotiation Graphics
Use slide animations effectively to enhance delivery and aid communication	Developing and Delivering Presentations Persuasion Persuasive Writing, Negotiation Graphics

Syllabus area	APMP BoK topic
Develop accompanying handouts that enhance the audience experience and compliment the key messages	Developing and Delivering Presentations Persuasion Persuasive Writing, Negotiation Customer focused opportunity capture skills and tactics
Give constructive feedback to improve the quality of the presentation materials and performance of others	Developing and Delivering Presentations Persuasion Persuasive Writing, Negotiation Communications Opportunity capture team selection and management
Lead discussions to pre-empt and remove objections using appropriate techniques (objection handling)	Developing and Delivering Presentations Persuasion Persuasive Writing, Negotiation Customer focused opportunity capture skills and tactics Communications
Negotiation	
Lead the development of a negotiation strategy early	Develop Opportunity Capture Strategy Negotiation
Research and use data from a range of sources to make robust fact-based decisions; make available choices clear and simple to stakeholders	Negotiation
Lead activity to prepare your negotiating range, and expected customer negotiation range.	Negotiation
Lead and manage buy-in and agreement on negotiation range with internal stakeholders prior to and during negotiations	Negotiation
Lead the activity to decide the opening position and the options that can be offered	Negotiation

Syllabus area	APMP BoK topic
Lead the negotiation team effectively; ensure each member is fully prepared for the negotiation; consistently secure positive outcome from the negotiation	Negotiation
Understand customer stakeholder's positions and bargaining power within negotiations	Negotiation Stakeholder Engagement and Management
Adjust personal positions and style quickly if circumstances change favorably and unfavorably; win concessions without damaging stakeholder relationship	Negotiation
Self Leadership	
Interpret messages and give an appropriate response	Communicating with Others
Adapt to a variety of situations needs, and desired benefits and develop positioning approaches that leverage supportive factors and overcome/minimize barriers	Communicating with Others
Ensure that others buy in to teams missions, goals, agenda, tone, policy	Communicating with Others
Implement decisions/initiate action within a reasonable time	Communicating with Others
Enforce consequences and take action for poor performance	Communicating with Others
Adopt appropriate leadership style: responsible, ethical, accountable and decisive, balancing performance focus with people focus	Communicating with Others
Plan and adopt a flexible approach with others based on an understanding of their view point	Communicating with Others
Leading Others	
Identify and understand issues and opportunities and the resulting decisions and have the ability to effectively delegate the implementation of the required activities and responsibilities	Communicating with Others
Implement decisions/initiate action within a reasonable time	Communicating with Others
Include others in the decision making process, make the most appropriate decisions, and ensure buy in and understanding of those decisions.	Communicating with Others

Syllabus area	APMP BoK topic
Allocate decision making authority and/or task responsibility appropriately to maximize organization and individual effectiveness.	Communicating with Others
Read and use verbal and non-verbal cues to build rapport, correctly interpret messages and give the appropriate response	Communicating with Others
Ensure understanding and respect for cultural beliefs, language and values of others; avoids ethnocentrism and displays behaviors commensurate with that understanding	Communicating with Others
Compellingly articulate concepts/ideas, complex situations/problems clearly, simply and in a manner that gains support/buy-in	Communicating with Others
Objectively and continuously assess that team members' have the right competencies	Communicating with Others Opportunity capture team selections and management
Form and lead complex teams (multi-cultural, multi-national, multi-time zone) across the organization and externally	Communicating with Others
Use an in-depth understanding of group interactions to achieve the desired outcome.	Communicating with Others
Demonstrate expertise at conflict resolution, using a wide range of formal and informal techniques	Communicating with Others
Adapt to rapid/last minute changes in circumstances	Communicating with Others
Internal and external stakeholder management	
Adapt an approach to satisfy customers in a manner that builds effective relationships check also	Stakeholder Engagement and Management Managing Customers Questions Customer Analysis and Competitive Intelligence Customer focused opportunity capture skills
Communicate compellingly and concisely at the most senior levels, building "behind-the-scenes" support for ideas	Stakeholder Engagement and Management

Syllabus area	APMP BoK topic
Recognize and/or use ongoing power and political relationships within the organization (alliances, rivalries) with a clear sense of organizational impact	Stakeholder Engagement and Management
Build productive relationships with stakeholders at senior levels based on mutual trust and respect	Stakeholder Engagement and Management
Demonstrate effective influencing and negotiating skills at the most senior political levels to achieve sustainable long-term win-win-win (customer-supplier-system) outcomes	Stakeholder Engagement and Management

Appendix A - Scenario and some questions from the Sample OTE

Sample Scenario

The following pages show the size and scope of the scenario from the actual sample examination paper; designed to be understandable by all candidates within 15-20 minutes. The scenario is relatively simple because it must be understood by all candidates, whatever their background, or industry. It is eight pages in total and comprises:

- The cover page
- The scenario description
- Information about the bidding organizations
- Additional information for the use of candidates in individual questions

The scenarios used in each of the live papers are similar to this in their setting and complexity– BUT NOT THE SAME.



The Capture Practitioner Examination

PX01

Scenario Booklet

This is a 2.5-hour objective test examination.

After the first 50 minutes, candidates may choose to take two five-minute breaks. Breaks must be taken after a main question and all associated sub-questions have been answered. During each break the 2.5 hours time will be stopped, restarting when the break has been completed. Candidates must manage their time in order to complete all questions.

This booklet contains the scenario upon which this exam paper is based. All questions are contained within the Question Booklet.

Additional information is provided within this Scenario Booklet for a number of questions. Where reference should be made to additional information, this is clearly stated within the question to which it is relevant. All information provided within a question must be applied only to that question.

There is a maximum of 80 examination points in the paper.

There are 8 Questions; each question will have two or three part questions (A, B, C). Each question, comprising of all associated part questions is worth 10 examination points combined.

The pass mark is 50% (40 examination points). Within each question the syllabus area to which the question refers is clearly stated.

The examination is to be taken with the support of the *APMP Body of Knowledge*. Candidates may choose to have a printed copy of The APMP OTE Preparation Guide, which contains an integrated Glossary of Terms.

Candidates may choose to take the examination using one or two computer screens.

Candidate Number:

Pampiland Transportation Authority Engineering Services (PTAES)

Scenario (Note: The companies and people within the scenario are all fictional.)

Background to the opportunity

The Pampiland Transportation Authority (PTA) has a need for specialist engineering and transportation consultancy services to support the delivery of its next generation public transport infrastructure projects. The PTA is looking for an organization to partner with its own engineering department for a period of 5 years. If the partnership works well, the PTA is planning to outsource its internal engineering and transport resources to the partner contractor – 103 staff in total.

Timescales and procurement process

The PTA is planning to hold a number of “open days” as well as “one-to-one meetings” with the prospective bidders. To ensure transparency and fairness of procurement, the PTA will take notes at each meeting and distribute to all bidders.

The Request for Proposals (RfP) is expected to be released in 72 weeks, with the contract placed 12 weeks later. Once the draft RfP is released, in week 44, contact with the stakeholders in the PTA will only be possible via the procurement team. The following meetings are planned by the PTA (Other ad-hoc meetings may be arranged):

Meeting	Week # from today	Purpose
Meet the Buyer 1 - open day	Week 4	Communicate the PTA's goals, objectives and 'pain points'
1-day meetings	Weeks 18-20	Clarification of PTA requirements and discussion of outline technical solution from each bidder
1-day meetings	Weeks 30-32	Presentation of refined technical solution from each bidder
1-day meetings	Weeks 36-38	Discussion of proposed commercial solution from each bidder
Meet the Buyer 2 - open day	Week 44	Issue the draft RfP and communicate any updates to the PTA's goals, objectives and 'pain points'
2-day meetings	Weeks 67-69	Finalization of proposed technical and commercial solutions with each bidder
RfP release	Week 72	Solicit written proposals from preferred bidders
1-day meetings	Week 78	Presentation from each bidder of its proposed final solution
5-day negotiations	Weeks 80-82	Negotiation of final solution with the preferred bidder
Contract placement	Week 84	Provision of services

Scenario Continues on next page

Pampiland Transportation Authority Engineering Services (PTAES)

Scenario Continued

The PTA vision and requirements

After a change of Government, the new Prime Minister has promised to invest in the country. The PTA plans to make Pampiland cities healthier, more inclusive and more sustainable, enhancing the quality of life for both residents and visitors.

They intend to promote innovation and encourage new ways of thinking. They look to the future by anticipating mobility needs and inspiring pioneering solutions.

The PTA are looking for a partner who will be flexible in delivery, as well as willing to exchange ideas and best practices. The head of the PTA is on record as saying that she does not believe that any single company has the capabilities to meet their needs. She is expecting competent bidders to work together.

The PTA has concluded that this requirement would be best met through the use of a framework agreement. Typical services anticipated to be called off under the framework agreement, relate to road and rail services only, include:

- feasibility studies
- scheme appraisals
- transport modelling
- social/economic evaluation
- preliminary and detailed design
- environmental appraisals and impact assessments
- market analysis and forecasting

The PTA has sought a budget from the Pampiland Treasury equivalent to 2-3 million US Dollars per year. The business case for the budget is based on the anticipated savings of not recruiting 50 full-time staff for the period. The business case has to be reviewed before a contract is let to confirm that the bidder is offering value for money.

The PTA may select more than one bidder organization for the framework contract.

Scenario Continues on next page

Pampiland Transportation Authority Engineering Services (PTAES)

Scenario Continued

Known interested organizations

TECHY Inc. (TECHY)

TECHY is a Joint Venture Company, set up between two global engineering services companies. It was formed to deliver a single project for the Pampiland Government. It has since delivered consultancy projects based on an integrated vision of mobility, encompassing all forms of transport, for many Governments in the Region.

They are known for their ability to look at all relevant issues from the start of a project, including:

- existing and future travel requirements
- urban planning
- economic and social development
- environmental protection.

They are enthusiasts for sustainable transport choices and service their clients from a base of geographically dispersed offices and teams.

TECHY has, for the last 3 years, received awards from industry for their White Papers on Transport and Mobility Innovation.

They help their clients to develop:

- transport policies
- provide advice based on behavioral analysis
- economic / financial / environmental assessments
- traffic forecasts and socio-economic studies.

TECHY has worked for the PTA for the last 11 years. They have delivered a series of, relatively small, one-off specialist projects, in both the road and rail sectors, and have a good reputation for delivering value for money.

Scenario Continues on next page

Pampiland Transportation Authority Engineering Services (PTAES)

Scenario Continued

CarlisDevon Consultancy (CDC)

CarlisDevon Consultancy has extensive experience in all sectors of road transport planning. They have demonstrated commercial understanding of working for public sector organizations around the globe. They work hard to achieve the optimum commercial outcome for their clients, minimizing financial exposure, devising intelligent, cost effective and environmentally friendly transport planning solutions.

Their services include

- providing concept and feasibility studies
- developing detailed designs and specifications
- managing public consultations and stakeholder engagement
- ensuring effective risk management
- helping to implement ongoing asset management strategies.

They have not worked for the PTA before but were recommended by the equivalent Government departments in 3 of their 4 neighboring countries.

Xnsis (XNS)

Xnsis is a relatively small consultancy firm based in Pampiland. They were established 9 years ago by 2 people who were previously General Managers at the PTA. One of the founders left the PTA when he was not promoted to the position of Executive Director Air Services. They have a strong cultural fit to the PTA because they understand the PTA's working practices intimately and they continue to employ ex-employees of the PTA.

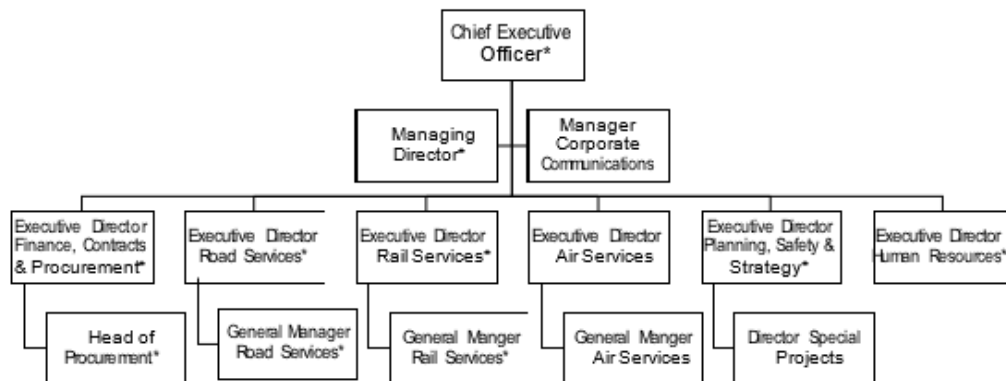
They are not specialists in any specific area of transport but do have a long history of working in the rail sector.

End of Scenario

Question 1: Planning and scheduling - Additional Information

Additional Information for Question 1 of the PTAES Scenario

*The following diagram shows the organization structure of the PTA. Those marked with a * are directly involved in the decision making relating to this procurement.



Question 5: Developing and managing strategy - Additional Information

Additional Information for Question 5 of the PTAES Scenario

TECHY Stakeholder Matrix

Position	Role	Level of Support		Hot Button
		Contact	Support	
Chief Exec Officer	Decision Maker	Not at all	Low US	Teaming
Managing Director	Decision Maker	Not at all	Low US	
Manager Corporate Communications	Unsure	Not at all	Low US	
Executive Director Finance, Contracts, and Procurement	Decision Maker	High	Medium US	
Executive Director Road Services	Decision Maker	Low	Medium US	No service disruption
Executive Director Rail Services	Decision Maker	Low	Medium US	No service disruption
Executive Director Air Services	Unsure	Not at all	Low	
Executive Director Planning, safety and Strategy	Unsure	Medium	Low US	
Executive Director Human Resources	Decision Maker	Not at all	Low US	Sustainable employment / socio economic factors?
Head of Procurement	Unsure	Low	Low US	
General Manager Road Services	Operational	High	Medium US	
General Manager Rail Services	Operational	High	Medium US	
General Manager Air Services	Operational	High	Medium US	

Question 7: Preparing for managing negotiations and presentations - Additional Information

Additional Information for Question 7 of the PTAES Scenario

Your priority	GET	VALUE		GIVE	Projected Customer Priority
		←	→		
1	Reduce risk and increase contract value by transferring PTA staff in a phased approach beginning 3 years from start of contract.	High	High	Open book accounting providing the PTA with detailed cost and profit reporting on a monthly basis.	Not known
2	Rights to exploit any intellectual property developed under this contract free-of-charge.	High	Medium	Capital investment by TECHY into Pampland in the form of new office facilities with space for the PTA's Engineering Services teams.	Not known
3	Make the performance measures in the contract easier to achieve.	Medium	Low	Penalties associated with not meeting performance measures.	Not known
4	Permission to publicize the contract and use the PTA as a reference customer for the contract duration.	Medium	High	Free training for the PTA's engineers to help them achieve the highest levels of recognized engineering certification.	Not known
5	Payments to be invoiced monthly in advance.	Low	Medium	One percent reduction on the daily rates.	Not known

Not Negotiable

1	Minimum contract duration must remain at 5 years.
2	Performance measures set out in the contract must not get more demanding than the current levels.
3	The day rates for engineers must remain within 5% of the quoted levels.

Sample questions

The following pages show actual questions from the sample examination paper. This guide contains actual questions from the sample examination paper. This part of the guide includes:

- Questions of each type – Classic, Multiple Response & Assertion Reason
- Following each question, a table showing the correct answers to each of the questions along with the rationale behind each correct answer. Contained in the rationale description is the reference to the relevant part of the APMP BoK

The questions used in each of the live papers are similar to this in their wording and complexity– BUT NOT THE SAME.

The real Question Booklet will contain six questions, each covering a different syllabus area, which will be clearly identified at the beginning of each question. Each of the six questions contains a number of part questions e.g. A, B, C or D. Each of the 'part-questions' will identify the portion of the examination points allocated to it. Each part question may have 3, 4, 5 or 6 question lines. Each question line within the part question attracts 1 mark, giving a total of 80 marks.

Using your knowledge of the scenario, try to answer each question before looking at the answer and rationale table.

This is one question with one correct answer.

Using the Scenario, answer the following questions about Capture Planning and Scheduling for the PTA opportunity.

Decide whether the approach taken is suitable and select the response that supports your decision.

1	The TECHY Capture Manager has decided to develop the Capture Plan as a PowerPoint presentation to enable fast and collaborative development. What change, if any, is most appropriate for the TECHY Capture Manager to make?
A	No change, because a Capture Plan should only record high-level information, the detail can be discussed.
B	No change because each Capture team member should keep their own record of assigned actions, customer interactions and outcomes.
C	Change because a PowerPoint Capture Plan will only show high level information and links to any additional information or supporting files.
D	Change because a Capture Plan that has been used for a similar customer with similar requirements should be used to reduce effort.

Rationale table

1	A	Incorrect:	Presentation based plan – Disadvantages - Lack supporting detail (require all contributors to provide links, references or attach supporting files Multiple outdated versions on laptops) An Opportunity Capture plan is a framework, a series of folders or buckets where you assemble and organize data by topic. Ask Opportunity Capture team members to add, update, share, and purge data as relevant and permitted. Ref: Opportunity Capture Plan Development. The TECHY Capture Manager will need to capture detailed information as well as high level information in the capture plan.
	B	Incorrect:	Presentation based plan – Disadvantages - Lack supporting detail (require all contributors to provide links, references or attach supporting files Multiple outdated versions on laptops) Ref: Opportunity Capture Plan Development. If the TECHY Capture Manager relies on individual capture team members to keep their own record of assigned actions, customer interactions and outcomes, there will be not be a consolidated Capture Plan. There must be a master capture plan to manage and oversee all activities.
	C	Correct:	Presentation based plan – Disadvantages - Lack supporting detail (require all contributors to provide links, references or attach supporting files) Ref: Opportunity Capture Plan Development. The Capture Plan for a complex opportunity such as the PTAES should contain a lot of detailed information. Therefore, it would be better for the TECHY Capture Manager to use an alternative medium to PowerPoint to create the Capture Plan. This would allow the detailed information and supporting files to be held and available to all in one place.
	D	Incorrect:	Unlike the top-down management driven corporate planning process, Opportunity Capture planning is opportunity specific. Opportunity Capture plans are driven bottom-up by the opportunity and the customer. Ref: Opportunity Capture Plan Development. The Capture Manager could use a Capture Plan template with standard headings, but the Capture Plan for the PTA opportunity should contain specific information that evolves over time.

This is one question with two parts to the correct answer.

Using the Scenario, answer the following questions about Capture Planning and Scheduling for the PTA opportunity.

The TECHY Capture Manager is developing the Capture Schedule and Plan.

Remember to select **2** answers to each question.

1	Which 2 considerations are most important for the Capture Manager?
A	Final approval of the Capture Schedule with the senior stakeholders should take place following clarification of requirements and discussion of the outline technical solution in weeks 18-20 with the PTA.
B	To avoid unnecessary rework, development of the capture strategy should be scheduled to begin after the PTA meeting in week 44.
C	Time should be built into the schedule to review and update the Capture Schedule to accommodate a changing competitive landscape.
D	Initial value propositions should be developed and tested with PTA during the clarification of requirements and discussion of outline technical solutions in weeks 18-20.
E	Price-to-Win development should be scheduled to begin in week 32 and be completed by week 36.

Rationale table

1	A	Incorrect:	Top management must endorse and help communicate the plan to everyone managing and executing the plan, as well as those impacted by the reassignment of individuals to support the plan. Management support must begin with the pursuit decision and continue through to the signed contract. Ref: Opportunity Capture Plan Development. The TECHY Capture Schedule should be set and approved early in the PTA Capture. Week 18 is too late.
	B	Incorrect:	Gathering intelligence early is vital to make an informed pursuit decision, developing your capture strategy and positioning your solution as the preferred solution. Schedule customer intelligence gathering and solution positioning activity as early as possible and continue until restricted. Ref: Use tools and Systems / Scheduling. The TECHY Capture Manager should manage strategy development to be dynamic and evolve as more information becomes available. Without strategy, the TECHY Capture team will not have a roadmap to win.
	C	Correct:	Keep the Opportunity Capture planning process flexible to permit adjustments depending on the importance of the opportunity to your organization, the competitive situation, and the resources your organization can afford to commit. Adapt to the needs and acceptable norms of your organization. Opportunity Capture Plans are living document that are repeatedly updated as you gain information. Information will change and become more specific as the opportunity matures Ref: Opportunity Capture Plan Development. Time should be built into the TECHY Schedule to review, and revise and evolve the necessary activities as the landscape changes.

D	Correct:	Having determined your solution, prepare draft value propositions for each type of buyer. Value propositions flow directly from the sales objective, but the better ones are detailed, specific and quantified. Develop value propositions collaboratively with your customer. Collaboration increases the probability that the customer's organization will accept your quantitative analysis. Ref: Developing Opportunity Capture Strategy. The TECHY Capture team should begin drafting and testing value propositions with the PTA as soon as possible. Collaborative development will help the PTA understand, and want the benefits of the TECHY solution.
E	Incorrect:	Price-to-win is used to identify what kind of solution your team should offer and the price point at which you should offer it. It should be engaged as early in the Opportunity Capture process before a solution is developed. Price-to-win activities are a continuous process, extending throughout the Opportunity Capture phase through post-award. Ref: Price-to-Win. TECHY should begin Price-to-Win activities before week 32 and they should continue throughout the capture process.

This is three questions with one correct answer each.

Using the Scenario, answer the following questions about Developing and Managing Tactics for the PTA opportunity.

Lines 1 to 3 in the table below consist of an assertion statement and a reason statement. For each line identify the appropriate option, from options A to E, that applies. Each option can be used once, more than once or not at all.

Option	Assertion	Reason
A	True	True AND the reason explains the assertion
B	True	True BUT the reason does not explain the assertion
C	True	False
D	False	True
E	False	False

	Assertion		Reason
1	TECHY should discover the business outcomes the PTA want to achieve from a teaming partnership.	BECAUSE	Trust between a buyer and seller takes time to establish.
2	TECHY should first consider partnering with an organization they have previously worked with.	BECAUSE	Performing due diligence on teaming partners is critical.
3	The Bidder Comparison Matrix shows that TECHY has the full capability to deliver the PTA solution; however, they should still consider teaming.	BECAUSE	Customers dislike teammates whose primary motivation is to reliably secure a share of the work without competition.

Rationale table

1	True:	Each interaction should have a specified objective to help the customer discover, analyze and quantify if possible the potential benefits that they are seeking to achieve, for their organization. Discover the benefits that the customer wants to achieve before you discuss the benefits that your solution might bring. Customers have a stake in teaming combinations, preferred partners, and contractual teaming arrangements. Review potential teaming combinations and arrangements with the customer, if possible. Whether encouraged by the customer or not, justify why you have teamed, describe the role of each partner, and explain the unique reasons the partner was selected. Ref: Opportunity Capture Management Skills / Teaming. The TECHY Capture team should discover why the PTA feel it the contract should be delivered by more than one organization, and what benefits they expect to receive from a teaming partnership. With this understanding TECHY can then position themselves to team, or develop strategies to convince the PTA that the contract can be delivered by one organization.	True:	Since most Opportunity Capture team members interact with the customer in some manner, they must be aware of these environmental and customer issues to become a trusted advisor. Trust between a buyer and seller takes time to establish. However, customers will lose trust in a supplier or partner whenever they feel misled or misunderstood. Ref: Opportunity Capture Management Skills. The reason does not explain the Assertion and therefore the answer is B.
2	False:	Automatically teaming with strategic partners for each targeted procurement, it is critical to objectively determine the rationale for assembling a team, and not to automatically include a strategic partner on a team unless it truly adds value. Ref: Teaming. The TECHY capture team should carry out an objective analysis to understand where they may have capability or resource gaps before deciding who to team with.	True:	Performing due diligence on potential teaming partners is critical. A company may look good on paper, but it could be a serious liability if the customer has a negative opinion about that company. Use personal and professional contacts in the customer's organization, industry, and local community to build a perception of the firm. Ref: Teaming.

3	True: At this stage, potential bidders should conduct a rigorous and honest self-assessment to identify gaps and deficiencies in their in-house resources and capabilities. For large and complex opportunities, many companies likely lack some resources or capabilities, especially when compared to competitors' and customers' expectations. Customers have a stake in teaming combinations, preferred partners, and contractual teaming arrangements. Review potential teaming combinations and arrangements with the customer, if possible. Whether encouraged by the customer or not, justify why you have teamed, describe the role of each partner, and explain the unique reasons the partner was selected. Ref: Teaming. TECHY should analyze themselves and the competition to confirm they have the capability to deliver the PTA contract. They should consider teaming arrangements as the PTA have stated that they do not believe one organization can deliver the full contract. They should discover why and what benefit the PTA believe they will achieve from a teaming partnership.	True: Customers have a stake in teaming combinations, preferred partners, and contractual teaming arrangements. Review potential teaming combinations and arrangements with the customer, if possible. Customers often review your teaming selection criteria as part of their evaluation and source selection process. For example, customers dislike teammates whose primary motivation is to reliably secure a share of the work without competition. Ref: Teaming. The assertion is true, and the Reason is True, but the Reason does not explain the assertion, therefore the answer is B.
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Appendix B - APMP Industry Glossary of Terms (Version 6)

This glossary has been compiled by interviewing more than 50 industry experts from around the globe, polling more than 750 APMP members, and gathering contributions from the writers, reviewers, and editors of the new APMP Body of Knowledge. This glossary includes more than 200 terms that cover a wide spectrum of business development activities with an emphasis on opportunity and proposal development.

Term	Equivalent or Corresponding Terms	Definition and Additional Information
Account Plan	Campaign Plan, Market Plan, Bullet Proofing, Business to Business (B2B) Plan	A sales plan that is specific to one customer and covers multiple opportunities with that customer. The timespan covered by the plan typically is two to five years.
Action Caption		A short, informative statement associated with a graphic that provides additional information to help the reader understand what the graphic means.
Active/Passive Voice		Sentences written in active voice have a clear subject and verb. They make it clear who does what. Passive-voice sentences, in contrast, are considered “weaker,” because the subject receives the action instead of performing it. Passive sentences usually contain a form of the verb “to be.” Here is an example: Passive: Risks will be managed by the Project Manager. Active: The Project Manager will manage risks.
Advantage		How, in the seller’s opinion, a product or service may benefit the customer. Advantages are potential benefits and are more powerful than features.
Aesthetics		A set of principles regarding the nature and appreciation of beauty. The study of aesthetics increases the validity of many critical judgments concerning art. Established aesthetic principles create a shared vocabulary and understanding for the objective evaluation of beauty.
After-Action Review	Lessons Learned Review	A systematic process to extract the learning from an event or activity. The process addresses the questions; What should have happened? What actually happened? What can we learn and apply for the future?

Term	Equivalent or Corresponding Terms	Definition and Additional Information
Annotated Outline		A simple writing or content plan. This is a structure for the proposal that is usually derived from the customer requirements documentation. The outline may be annotated to show writing responsibilities, informative headings, page-count estimates, and so on. The annotated outline amplifies a topical outline by further defining the content of various proposal sections. This technique can be an alternative to complex and time-consuming content planning. It also is a tool to help determine and validate whether opportunity planning activities have made it into the planned proposal outline and placed you in a position to win.
Appendix	Attachment, Addendums	Supplementary material included at the end of a proposal. Appendices contain specialized, relevant information that facilitates the decision making process.
Assumptions		Conditions that the bid team assume exist for the purpose of providing a price or terms of service in a proposal.
Balance (Visual)		Balance is achieved when the visual “weight” of both halves of a graphic is similar, giving a sense of equilibrium. Unbalanced graphics convey a sense of uneasiness.
Benchmarking		A systematic process for comparing your processes with those of other recognized leaders in your field or industry to identify and close gaps.
Benefit		A benefit results from a feature of an offer that resolves a customer issue and demonstrates the value the customer can achieve from resolving the issue. To claim a benefit, there must be a feature of the offer that clearly allows the customer to realize the benefit. Benefits help customers achieve business goals. They answer the question, “so what?”
Best and Final Offer (BAFO)	Final Offers, Final Proposal Revision (FPR), Call for Revisions, Negotiated Offer, Adjusted Offer	A customer request for a document that describes your organization’s final price. There may be more than one request for a BAFO. The customer requests a BAFO after the proposal has been submitted to select the final companies to negotiate with or go directly to award.

Term	Equivalent or Corresponding Terms	Definition and Additional Information
Bid Decisions (General)	Decision Gates, Sales Funnel Pipeline, Decision Points	Bid decisions are aimed at eliminating opportunities or sales leads with a low win probability, thus permitting a stronger focus on opportunities with a higher win probability. For large, complex pursuits, companies often use market entry, opportunity qualification, bid pursuit, bid/no-bid, bid validation decision, and business case review/senior management reviews. For smaller, more routine bids, companies often have a single decision. Nevertheless, that one decision milestone should involve a conscious decision against pre-determined criteria to pursue the opportunity or not. The level of decision maker(s) for bid decisions should reflect the probability of win, risk, value, and required investment. Formal bid decisions should occur at designated points in the opportunity and proposal development process.
Bid Decision Tree	Bid Workbook, Opportunity Assessment Checklist, Bid Screen, Bid Flowchart	A tool used to help you make an informed bid decision based on positive and negative indicators. It results in a “yes” or “no” response leading to a qualified pursuit decision.
Bid/No-Bid Decision	Preliminary Bid/No-Bid Decision	A milestone after the opportunity plan is substantially complete. It validates that you are properly positioned to win based on the opportunity plan.
Bid or Proposal Center	Resource Center, Bid Desk	A support organization dedicated to generating proposals and other response documents for customers.
Bid Pursuit Decision	Pursuit Decision	Generally, the first decision milestone to verify that the opportunity fits your strategic direction and capability. This decision often approves the funds to initiate early opportunity planning activities. Sales may do an opportunity qualification decision before this decision gate.
Bid Validation Decision	Final Bid/No-Bid Decision	A decision milestone after the customer releases an RFP to address obstacles to winning that were identified in the opportunity plan.
Bidder Comparison Matrix (BCM)	Bidder Comparison Chart, Solution Comparison Worksheet	A tool used to analyze the customer’s current perception of your solution compared to competitors. It usually is a weighted score that indicates the customer’s confidence that you can meet their requirements.

Term	Equivalent or Corresponding Terms	Definition and Additional Information
Boilerplate	Customizable Reusable Content, Knowledge Repository, Knowledge Resources	Stored text and graphics that are available for potential reuse in future proposals. Boilerplate is information that is harvested from existing documentation to be repurposed in other proposals. It may include text and graphics, technical specifications, company procedures, and advertising and marketing materials, such as generic descriptions of the company or organization. You may want to use boilerplate to build a tailored description customized for the project and client.
Business Case	Opportunity Financial Analysis, Prospectus for Offer, Pro Forma Analysis	An internal documented argument for bidding on a particular opportunity. The business case typically focuses on the financial aspects of the bid. The same term may also be applied to a document or proposal section that is aimed at providing the customer with the financial justification for making the purchase.
Business Case Review/Senior Management Review	Gold Team Review, Final Bid Review, Business Case Review	All the internal milestones and approvals (internal governance) required to sign off on the solution, pricing, and legal requirements.
Business Development Capability Maturity Model (BD-CMM)		A research-based framework that guides business development organizations in identifying and implementing high-priority improvement actions. The model encompasses the entire business development life cycle. It establishes a structure that guides increased performance to: • Increase value to the customer • Build management visibility and leadership • Expand the competency of individuals and teams • Improve processes and accountability • Enhance systems and infrastructure
Business Development Maturity Level	Business Development Capability Maturity Model (BD-CMM) Level	An indicator of an organization's adoption of business development best practices. For example: • Level 1 organizations have ad hoc processes and are often seen as chaotic. • Level 2 organizations have repeatable processes and build on past successes. • Level 3 organizations have defined processes and focus on building customer solutions based on pre-agreed need. • Level 4 organizations have carefully managed processes and close, ongoing customer relationships. • Level 5 organizations continually improve and optimize their business development approaches.

Term	Equivalent or Corresponding Terms	Definition and Additional Information
Business Development Phases	Sales/Marketing-Related Activities, Sales Governance, Sales Process, Selling Phases	There are eight generally accepted business development phases: • Market identification • Account planning • Opportunity/capture assessment • Opportunity/capture planning • Proposal planning • Proposal development • Negotiation • Delivery Opportunity/capture assessment, opportunity/capture planning, proposal planning, proposal development, and negotiation are most relevant to the bid and proposal environment. In short-turnaround, less-complex pursuits, some of these phases may be combined or truncated. This is often the case in the commercial sector. When involved in proposal support for high-volume, relatively small transaction-level sales, very short business development processes are the norm. However, to produce the best possible results, organizations should use a repeatable, well-managed business development process.
Callout Box	Focus Box, Highlight, Emphasis, Key Point, Attention Point	A design feature with text inside a box or within borders to highlight a key point in the text.
Capture Plan	Opportunity/ Capture Plan	See Opportunity/Capture Plan.
Central Processing		Decision making based on logic and sound arguments. This type of processing is often used by experts but is less common in general than peripheral processing.
Change Management		The application of tools, processes, skills, and principles to transition people from one way of working to another.
Clarification		Communication to eliminate minor irregularities or apparent clerical mistakes in a request for proposal (RFP) or in a proposal. In government settings, these are typically limited and structured exchanges between the Government and offerors that may occur after receipt of proposals. In business or commercial settings, the rules for clarification are often set out in the bid document, but informal engagement to clarify terms may also occur.

Term	Equivalent or Corresponding Terms	Definition and Additional Information
Color		A technique used for emphasis, color may be applied throughout the proposal to headings, callouts, sections, tabs, and anywhere else the solicitation instructions allow. The use of color can enhance the readability of the document and draw the reader's attention to specific content you wish to highlight. Use customer colors, if possible, to gain or retain the attention of the evaluator.
Community of Practice (CoP)		Networks of people who work on similar processes or in similar disciplines and who come together to develop and share their knowledge in that field for the benefit of themselves and their organization. CoPs may be created formally or informally, and members can interact online or in person.
Competitive Intelligence (CI)	Competitive Analysis, Competitive Assessment	Objectively understanding the strengths, weaknesses, and strategies of companies competing against your company for business. CI is a well-defined business practice to understand the competitive forces and market dynamics that affect your company's viability and long-term profitability.
Competitor Review	Black Hat Team, Black Hat Review, Competitor Strategy Review, Competitive Intelligence Review, Competitive Assessment Review, Competitive Solutions Review	An assessment and analysis of competitors' likely strategies and solutions. People who are independent of the opportunity planning team and are experts on the customer and competitors conduct this review.
Compliance Matrix	Compliance Checklist, Requirements Checklist	A list of specific customer requirements, often splitting complex, multi-part requirements into subrequirements. It also helps Proposal Managers and Internal Reviewers verify that the proposal meets all requirements.
Compliant Versus Responsive	"Answers the Mail" Versus "Connects with the Customer"	Compliance is the act of meeting stated requirements, such as those in an RFP or contract. A compliant proposal response meets the customer's requirements, answers their questions, and addresses specifications to the letter—nothing more, nothing less. Responsiveness goes beyond compliance. Responsive proposals address customer goals, underlying concerns, and key issues and values that might not be spelled out in the solicitation. Responsive proposals help customers achieve their business goals, not just their project or procurement goals.

Term	Equivalent or Corresponding Terms	Definition and Additional Information
Contact Plan		A document that lists the customers you plan to contact, including details, such as who in your company will visit them; what you want to find out and what you want to communicate; when and where you will meet; and how you will communicate your messages, plus documentation of any information you gather during a meeting. It is an essential tool for successful customer relationship management (CRM).
Content Management System (CMS)		A computer system that makes it easier to develop enterprise portals and websites by separating the management of content from its presentation (display). Blocks of content are tagged with metadata and other attributes and held in a content database. Webpages are generated (often on the fly) by accessing content from the database and inserting it into the relevant placeholders on webpage templates. Because a single block of content may appear on many webpages, this simplifies maintenance and updates.
Content Plan	Writing Plan, Content Development Plan, Storyboard, Storyboard Plan, Proposal Planning Framework, Mock-Up, Annotated Outline, Bid Directive, Bid Plan, Annotated Outline, Mind Map	A guide and framework for addressing requirements, detailing win strategy and themes, and meeting page allocation requirements. A content plan is composed of a variety of conceptual tools used to help writers plan each section/response before drafting text. It contains assignments, bid request requirements, strategies, preliminary visuals, informative headings, and bulleted content. A content plan helps writers plan their content and integrate text and graphics before actual writing begins.
Contingency Plan		A documented approach to address unplanned future events or circumstances. Negative events are often the focus, but the plan can also include unexpected positive developments. The impacts of unexpected developments are identified to the extent possible. Mitigation plans and alternate courses of actions are documented.
Cost Section	Cost Volume	The proposal component that includes your cost data. This section may contain more than just financial information, such as schedules, material listings, labor categories, and hours. The cost section also reflects the products and services offered in the technical and management sections.
Customer	Client, Prospect	An existing or potential buyer of products or services. Customers who have not yet made a purchase are sometimes called "prospects."

Term	Equivalent or Corresponding Terms	Definition and Additional Information
Customer Budget		The amount of funding available to procure the products or services defined by the RFP or other solicitation document. For an offer to be affordable to a customer, the customer's budget must be greater than or equal to the price.
Customer Debrief	Customer Feedback, External Lessons Learned	A meeting with the customer after an award to obtain feedback on how your proposal scored in the evaluation.
Customer Focus	Responsive Bid	A customer-focused bid clearly addresses the problem the customer has agreed they are trying to solve (or the opportunity they are trying to take advantage of) and demonstrates how your solution meets their goals.
Customer-Focused Writing		Persuasive writing that focuses on the customer issues and benefits of your offer to the customer, rather than on your company and its capabilities.
Customer Intelligence		An understanding of a customer's needs—spoken and unspoken—and the capabilities desired of a vendor/contractor to support requirements. It is a key element of the sales and opportunity development process that occurs well in advance of responding to a bid or RFP.
Customer Issues		Customer concerns that the offer will resolve. Issues may be the business outcomes the customer is trying to achieve. They also may be emotional and therefore not articulated in the customer's requirement documents.
Customer Motivators	Motivators to Buy	A subset of issues that relate to the fundamental reasons behind the customer's need to make a purchase.
Customer Positioning		An organization's position from the perspective of a customer. Many companies begin in unknown positions with potential customers. Through marketing and sales strategies, a company may move to a known position, then an improved position, and eventually to a favored position.
Customer Profile	Account Profile, CRM Data	A maintained record of the characteristics of the customer. The profile is used from bid to bid and provides useful background information.
Customer Relationship Management (CRM)		The process of managing all aspects of your relationship with your customers, so they will know, like, and trust you and eventually select you over your competitors.
Customer Requirements	Must-Haves, Compliance Factors	The attributes and specifications of a product or service as determined by the customer.

Term	Equivalent or Corresponding Terms	Definition and Additional Information
Daily Stand-Up Review	Stand-Up Meeting, Checkpoint Call, Action Items Review, Coordination Call	A short meeting held at the same time every day during the proposal development phase. Its purpose is to keep the proposal team focused on near-term tasks. When managing a virtual team, it often involves the use of web conferencing, teleconferences, and email.
Data Call		Requests to members of your company and teaming partners for data to be used to build proof points and answer specific financial, demographic, and experience-related questions.
Delivery	Contract Execution, Installation	The process of implementing the delivery of the negotiated solution to the customer and maintenance of an ongoing relationship with the customer.
Delivery Risk		A customer's assessment of the likelihood that you can fully deliver the solution in your proposal at the stated price and according to the stated schedule.
Differentiator	Unique Selling Point	A feature of your offer that differs from the competition but does not necessarily matter to the customer.
Discriminator	Key Award Factor, Unique Advantage	A feature of your offer that differs from the competition and that the customer acknowledges as delivering a benefit. Commonly, a weak discriminator is only distinct from one competitor's offer and not from all other competitor's offers. A positive discriminator is a benefit only one bidder can rightfully claim and is significant enough to the customer that they could cite it in justifying the award to the company offering it.
Document Template	Proposal Template	A blueprint that ensures writers are using the same format and structure for their response to save time, energy, and rework. Accompanied by the proposal-specific style sheet, the template should be used by everyone contributing to the proposal to enable seamless consolidation of team members' various contributions to the final proposal document.
Elevator Speech	Sales Pitch, Elevator Pitch, Elevator Statement	A concise set of reasons a customer should choose your organization's offer. A variety of people, including Project Managers, Sales Representatives, and Executives, use elevator speeches to get their points across quickly to customers. An elevator speech may be presented in oral, written, and video formats.

Term	Equivalent or Corresponding Terms	Definition and Additional Information
Executive Summary	Proposal Overview, Management Summary, Management Overview	A short abstract of the main points of the offer aimed at the senior-level decision makers in the customer's organization. It is the section of a proposal that provides an overview of the offer and highlights the key selling points for customer decision makers. It articulates the customer's vision and presents win themes and win strategies that substantiate "why us." It may be a separate section fronting the proposal or included in the cover letter accompanying the proposal. An executive summary can provide guidance to the writing team when written before other proposal sections. Identify the executive summary by whatever name the customer uses in the instructions.
Expert Locator		A system for identifying and cultivating subject matter experts (SME) on topics important to your business.
Explicit Knowledge		The captured and cataloged information and knowledge ready for people to use. In contrast with tacit or implicit knowledge, explicit knowledge is codified and articulated. It appears in documents, procedures, and databases.
Feature	Product Specification, Service Feature	Tangible aspects of the seller's product or service. They are normally measurable and demonstrable. Features tell the "what" of the offer. Benefits address the offer's added "so what."
Final Document Review	Red Team Review, Document Readiness Review	A comprehensive review of the proposal by independent reviewers who emulate the customer's evaluation team. It includes independent assessment of the entire proposal, its readiness and responsiveness to the solicitation, and its effectiveness in conveying strategy, themes, and discriminators, as well as ghosting the competition.
Formatting Techniques		Practices that involve the mechanical structure and appearance of the proposal. They include the standards and procedures for proposal layout dictated by the customer or by an in-house proposal development style guide.
Functional Reviews	Color Team Reviews	Reviews are conducted at a series of pre-defined stages during the proposal development process. They ensure that a proposal in development is compliant with a customer's requirements and has a good probability of winning a bid. Many reviews are followed by a corresponding bid decision.
Fundamental Knowledge Object (FKO)		The lowest structurally definable unit of content pertinent to a discipline. An FKO for Proposal Managers might be the question and answer (Q&A) pair.

Term	Equivalent or Corresponding Terms	Definition and Additional Information
Gadfly Review		A macro-level review of the entire proposal to ensure it sells your solution, is comprehensive, and tells a consistent story. The Gadfly Reviewer checks compliance with your quality standards for themes, format, graphics, action captions, style, headings, summaries, and introductions.
Ghosting the Competition		A sophisticated tradeoff analysis used to highlight a competitor weakness or downplay a competitor's strength. When using these techniques, competitors are not named. Ghosting and tradeoff analysis are similar. Tradeoff analysis discusses analysis of alternative approaches and then notes why one approach was selected and the others were not. The same technique is used in proposals to ghost the competition. The goal is to provide the customer with information that supports the view that your solution is superior and to cast doubt on the viability of competitors' approaches.
Graphics	Visuals	Visual elements of a proposal that help explain a concept when a text-only description is insufficient or would be difficult to understand. Good use of graphics makes complicated information easier to process and comprehend. Varying graphic types and styles can help you communicate your message and simplify or reinforce your argument and what you are trying to sell. Key practices for developing graphics include: • Identifying and drafting graphics before writing text • Ensuring graphics demonstrate an understanding of customer's needs • Keeping graphics simple and uncluttered • Including action captions that add value to graphics
Graphics Label		Titles above proposal graphics that are sequentially numbered throughout a proposal section. Graphics labels allow an evaluator to quickly locate a graphic within a proposal, especially when a proposal contains a list of figures/graphics similar to a table of contents. Labeling should also be applied to the x and y axes of graphs and charts, columns and rows in tables, and features of drawings or illustrations with arrows or lines with explanatory text.
Graphics Template		A visual guide that defines all aesthetic choices for graphics (e.g., colors, shapes, lines, arrows, fonts, indentation, capitalization, and line spacing).

Term	Equivalent or Corresponding Terms	Definition and Additional Information
Highlighting Techniques	Emphasis Devices	Different font styles, spacing, alignment, placement of graphics, and groupings meant to create impact, draw attention, and enhance readability. Common techniques include bolding or italicizing text, using color, increasing font size, or varying font choice.
Hot Buttons	Customer/Client Issues, Pain Points	Singularly important issues or sets of issues that are likely to drive decisions, usually associated with customer buying decisions. Hot-button issues are items that the customer repeatedly discusses and often are problems with a system, software, process, or resources inhibiting the success of the customer's organization.
Informative Heading		Headings that enable evaluators to immediately determine both the contents of a section and the benefit to their organization. Informative headings signal new topics to evaluators, may link features to benefits, and often cite features that are discriminators.
Innovation		The optimum balance achieved by using the latest technologies, cost structures, styling, features, and services, and then successfully matching what is "new" to customer or end-user needs at the optimum price.
Intangible Value		Your customer's perception of what the product or service you are proposing is worth to them. Intangible value can be measured only qualitatively.
Invitation to Tender (ITT)	Request for Proposal (RFP)	A customer document that invites a bid. In many industries, these are complex requirements documents that cover all technical and commercial aspects of the bid. There may be a subsequent BAFO or final proposal revision (FPR) stage before contract award.
Jargon	Technical Language	Specialized language used among members of a group or profession who have common knowledge. The use of jargon can be a barrier to communication with those not familiar with the language of that field. Use jargon only when customers will be familiar with it and only when plain English will not suffice.
Joint Venture		A business agreement in which two or more parties agree to pursue a bid opportunity according to outlined terms and conditions.
Kickoff Meeting		A meeting that initiates the proposal effort for all contributors, answers questions about the opportunity, assigns writing tasks, coordinates upcoming activities, and creates a cohesive team.

Term	Equivalent or Corresponding Terms	Definition and Additional Information
Knowledge Audit		A systematic identification and analysis of an organization's knowledge needs, resources, flows, gaps, uses, and users.
Knowledge Base		An organized structure of information that facilitates the storage of ready-to-apply intelligence in a database.
Knowledge Café		An informal brainstorming technique in which a moderator prompts a group to generate ideas and captures those ideas for further analysis.
Knowledge Management		The discipline of enabling individuals, teams, and entire organizations to collectively and systematically create, share, and apply business development-related knowledge to better achieve their objectives. Some organizations use collaboration tools, such as Microsoft SharePoint, to score and share information.
Knowledge Management Heuristic		An exploratory problem solving technique. As you interview Knowledge Workers for sources and uses of knowledge, each answer prompts additional, probing questions. A knowledge management heuristic guides Interviewers along this path.
Knowledge Map		A visual representation of the knowledge of an organization or the knowledge underlying a business process. It identifies business-critical knowledge assets and the processes, gaps, sources, flows, barriers, dependencies, and knowledge at risk if key employees leave.
Knowledge Repository		A place where knowledge is gathered and stored and can be accessed. Whereas a low-tech knowledge repository could be a set of file folders, we usually think of knowledge repositories as structured collections of ready-to-use information stored in a database.
Knowledge Sharing		An activity through which knowledge is exchanged among people, friends, families, communities, or organizations.
Knowledge Strategy		An organization's plan for implementing knowledge management.
Lessons Learned		Concise descriptions of knowledge derived from experiences that can be communicated through mechanisms, such as storytelling and debriefing, or summarized in databases. These lessons often reflect on "what we did right," "what we would do differently," and "how we could improve our process and product to be more effective in the future."

Term	Equivalent or Corresponding Terms	Definition and Additional Information
Lessons Learned Review	Quality Review, Root Cause Analysis, Learning Sessions, Method for Continuous Improvement	An assessment of the proposal development/management process and results and is conducted after completion of a proposal. The purpose is to identify areas for improvement on subsequent projects.
Management Plan	Management Approach, Project Plan	A bidder's approach for the conduct and management of the project or program required to satisfy the requirements of the RFP, including contract provisions, schedule, and statement of work (SOW)/statement of objectives (SOO) tasks. This portion of a proposal shows that you can deliver what you are proposing by explaining how you will manage the work, who will perform it, what resources you will require, how you will mitigate risks, and how you will ensure quality and adherence to cost and schedule commitments.
Management Section	Management Volume	The section of the proposal that includes the management approach with an explanation of how management processes, procedures, standards, and tools will be used to meet project objectives, as well as what processes and tools are used to monitor and control the technical, schedule, and cost performance of the proposed project. It includes an explanation of how the customer will be involved as well as any teammates and may include staffing, security, training, deliverables, transition planning, risk management, quality assurance, and performance metrics. Common plan elements are organizational structure, lines of communication and authority, roles and responsibilities, work locations, and the escalation path for problem resolution.
Market Assessment		An assessment of the plan to achieve specific business market objectives within an industry or market segment.
Market Entry Decision	Go-to-Market Decision	The decision that confirms that the identified market segment is aligned with the goals in your strategic plan.
Market Identification	Market Segmentation	The ongoing activity that defines and qualifies target markets for pursuing business.
Market Strategy	Market Plan, Go-to-Market Plan, Target Marketing	A plan to achieve specific business market objectives within an industry or market segment.

Term	Equivalent or Corresponding Terms	Definition and Additional Information
Memorandum of Understanding (MOU)		An agreement setting forth the terms and conditions under which participants agree to cooperate in the performance of a specific customer engagement or program. It is an agreement between two companies that documents team guidelines and work scope.
Milestone Schedule		A plan that outlines major milestones during the bid opportunity and proposal development processes.
Mock-Up		A technique that allows a writer to visualize how text and graphics will appear on a page or content plan. Mock-ups make it possible to refine an outline with headings and bulleted content while showing how much of the page will be used and how much space is needed to address all customer requirements. It is a visual outline of written and graphical content that is designed before building a section of the proposal.
Negotiation	Contract Negotiation	The process of preparing for and performing final discussions with the customer after the proposal has been submitted. Negotiation may include refining the offer, resolving terms and conditions, and finalizing a contract.
Nominalization		A noun derived from a verb or an adjective, often with a suffix like <i>-tion</i> , <i>-ment</i> , <i>-ance</i> , <i>-ity</i> , and others. These words often make text sound wordy and difficult to understand and should be avoided when possible.
Non-Compliant Bids		A bid or proposal that does not meet the customer's requirements.
Noun Stack		Two or more nouns that modify another noun, such as "business development data library." Noun stacks are hard to read and may cause ambiguity.
Opportunity	Sales Lead, Qualified Opportunity	A set of circumstances unique to a customer that make it feasible to sell products or services to the customer. In mature organizations, opportunities go through a qualification and review process.
Opportunity Qualification	Opportunity Identification, Opportunity Assessment	The process of researching specific opportunities to determine if they match your organization's interests, capabilities, and resources available to bid on and implement.

Term	Equivalent or Corresponding Terms	Definition and Additional Information
Opportunity/ Capture Plan	Capture Plan, Sales Plan for Specific Opportunity, Pursuit Plan	A documented plan that is developed during the opportunity/capture planning phase. It is specific to the opportunity and identifies actions and strategies to position your organization to be the customer's preferred bidder. It generally contains customer and competitive information, analysis, strategies, and actions. It is initiated for completion after a pursuit decision. The opportunity plan is also the customer approach developed by the opportunity team that documents customer mission/vision, customer hot buttons, competitive assessment, win strategies, win themes, discriminators, and actions necessary to win.
Opportunity/ Capture Plan Review	Blue Team, Win Strategy Review	An assessment of the opportunity/capture plan. It validates the win strategy and required actions documented in the opportunity plan.
Opportunity Planning	Capture Planning	The process of preparing a plan specific to an opportunity and identifying actions and strategies to position your organization to be the customer's preferred bidder.
Opportunity Qualification Decision		An early milestone to determine whether an opportunity matches your organization's basic interests and is worth the additional resources required to do a more detailed assessment. This decision, often made by sales, initiates the opportunity assessment process that feeds the bid pursuit decision.
Opportunity Rate	Capture Rate	The ratio of the value of opportunities won to the value of opportunities submitted, expressed as a percentage. However, be aware that the ratio can be misleading. More mature organizations track additional win/loss data and include it in their opportunity analysis. Opportunity data can be adjusted for opportunities pending decision, canceled by the customer, or withdrawn by the bidder. Business development professionals in more mature organizations believe opportunity rates provide a better metric of business development performance than win rates.
Opportunity/ Capture Strategy	Sales Strategy, Win Strategy, Action Strategy, Pursuit Strategy, Capture Strategy	The collection of tactical strategies and actions that are developed following the pursuit decision and documented in the opportunity plan to win a specific defined opportunity.

Term	Equivalent or Corresponding Terms	Definition and Additional Information
Organizational Culture		The specific collection of values and norms shared by individuals and groups in an organization that controls the way they interact with one another and with people outside the organization.
Page-Column Format (One Versus Two)		Documents can be formatted in single or multiple columns. Page format affects the readability and accessibility of proposal information. Select the number of page columns, and design that balances your need for page limits, readability, and graphics flexibility. As a rule, multiple columns offer more flexibility in page layout and may accommodate more words per page than single-column designs.
Partner		Another company or organization with whom you have a formal agreement to jointly participate in a specific opportunity. Entering into a partnership with another entity can expand your organization's ability to bid on and win business. A memorandum of understanding (MOU) should be used to describe the contractual agreement between organizations.
Past Performance		A favorable impact, results, or solution to a similar customer's issues. It emphasizes cost, schedule adherence, plus the basic question of whether the bidder did what was expected.
Peer Review	Peer Edits, Coaching Review, "Another Set of Eyes"	The evaluation of proposal-related information or documents by another Proposal or Bid Manager to enhance the quality of work. Although not considered as rigorous as a formal review, peer reviews are often used in small settings and for quick-turnaround bids.
Performance Risk		Risk associated with the probability that an offeror will successfully perform on the contract they are bidding on based on their record of past performance on similar contracts.
Peripheral Processing		Decision making using heuristics and mental shortcuts that may or may not be accurate. Research has found that this type of processing is more commonly used than central processing.

Term	Equivalent or Corresponding Terms	Definition and Additional Information
Persuasive Writing		Writing structure and techniques used to influence prospective buyers to accept your products and services. You can persuade your readers by: • Appealing to their reason (supporting assertions with facts, logic, and proof points) • Convincing them that you have their interests at heart (showing you understand their need and know how to help) • Appealing to their emotions (the fear, uncertainty, doubt [FUD] factor) and ghosting the competition • Using templates to enforce key communication elements: ○ Theme statement* ○ Summaries (beginning, interim, and ending) ○ Introduction, previews, roadmaps, informal table of contents ○ Informative and telegraphic headings* ○ Action captions* ○ Vision statements ○ Linking statements, transitions ○ Graphics* ○ Page-column format* • Using structure and organization to increase retention and understanding: ○ Order according to customer interest (as requested, order of importance, chronological, process, etc.) ○ Summarize at all levels ○ Group similar ideas ○ Present the most important ideas first ○ Design information for the reader *Defined elsewhere in the glossary.
Pre-Qualification Questionnaire (PQQ)		A customer document used at an early stage of a procurement to create a list of viable bidders who will later be invited to tender an offer or respond to an RFP.
Price	Tariff Price, Negotiated Price	The price is the amount you charge your customer for a product or service in a bid.

Term	Equivalent or Corresponding Terms	Definition and Additional Information
Price-to-Win	Winning Price Determination	A process for analyzing competitive and customer data to identify how to package and price a winning offer to a customer. Customers often look for a tradeoff between capability and purchase price before making the purchasing decision. Generally, the following relationship must be true: Customer's Perceived Value $\geq$ Customer's Budget $\geq$ Your Price $\geq$ Your Cost.
Pricing, Bottom-Up	Cost Build-Up	A pricing approach that approximates the size (duration and cost) and risk of a project (or phase) by: • Breaking it down into its smallest work components • Estimating the effort, duration, and cost of each component • Aggregating the components into a full estimate Determining duration through a bottom-up approach requires sequencing and resource leveling as part of the scheduling process.
Pricing Strategy	Winning Price Development	Differentiating value and price such that the customer perceives the value of your proposal to them to be greater than the price you are charging. In competitive situations, the winning offer will generally have the greatest differential between value and price.
Pricing, Top-Down	Affordability Analysis, Competitive Price Analysis	A pricing approach that considers the customer's budget and perception of the value of the products or services you are offering as well as an analysis of what your competitors will charge for their offer.
Prime Contractor	Prime, Main Contractor	The contractor that owns the contract with the customer and has full responsibility for its execution. A prime contractor may employ and manage one or more subcontractors or suppliers to carry out specific parts of the contract but is contractually responsible for their performance.
Principles of Influence	Weapons of Influence	Six strategies that can be used to influence decision making. These include reciprocity, consistency, social proof, liking, authority, and scarcity.
Proactive Proposal	Unsolicited Proposal, Sales Proposal, Commercial Proposal, Sales Letter	A proposal generated after an informal discussion with a customer (e.g., a sales visit or phone call) in which an unmet customer requirement is discovered.
Probability of Go	Pgo	The likelihood that a program will be funded and proceed.

Term	Equivalent or Corresponding Terms	Definition and Additional Information
Probability of Win	Pwin	The likelihood that you will win a bid.
Process Areas		In the BD-CMM, clusters of related activities that, when performed collectively, achieve a set of goals considered important for establishing process capability.
Process Milestones	Checkpoints, Decision Gates, Sales Filters	Milestones used to define and evaluate the inputs and outputs between phases of opportunities. Defining clear, mandatory milestones establishes a solid framework for managing opportunities large or small. These pre-defined quality checks minimize wasted efforts and increase process effectiveness. Even small opportunities benefit from a few well-conceived management milestone reviews. Milestone reviews may include preliminary interest screening, pursuit decision, preliminary bid decision, final bid/no-bid decision, and final review.
Products and Services	Deliverables	The deliverables resulting from a winning offer.
Project Schedule	Critical Path Scheduling, Project Plan	A schedule that identifies the tasks to be performed for a project and assigns deadlines for their completion. Scheduling requires a comprehensive understanding of which action steps are required, their sequence, and their expected duration. Good schedules maximize parallel tasks and minimize sequential tasks.
Project Scheduling Tools		Tools used to track proposal activities. They include calendars or Gantt charts used to identify major milestones and proposal deliverables.
Proof Points	Substantiation, Evidence	Pieces of information Proposal Developers use to support the soundness of a solution. They often describe performance on similar past efforts and can take the form of project data, case studies, customer quotes or testimonials, awards or recognition earned, and more.
Proposal	Bid, Offer, Bid Response	A written offer from a seller or bidder to a customer. The proposal may be proactive or unsolicited, or it may be in response to a request for bids from the customer.

Term	Equivalent or Corresponding Terms	Definition and Additional Information
Proposal Budget	Bid and Proposal (B&P) Budget, Non-Monetary Budgets (Time, Resources, Pages, Staffing)	The cost or resources required to complete a proposal. Elements of the budget will vary by organization and industry. The budget may include the entire cost of winning the bid or only the cost of developing the proposal. For government bids, a specified portion of the cost of the bid may be charged back to the government as a legitimate cost of doing business as part of general and administrative expenses. In some organizations, Proposal and Bid Managers may not be responsible for the cost budget but do have responsibility for budgeting time, resources, staff, or page limits.
Proposal Development	Proposal Preparation	The process of preparing, reviewing, and approving a bid or proposal.
Proposal Management	Proposal Planning, Sales Coordination, Sales Strategy Execution, Sales Support	The collection of processes for managing a successful, cohesive team to write, develop, assemble, and deliver a winning proposal.
Proposal Management Plan	Proposal Workbook, Bid/Proposal Plan, Proposal Strategy Plan	The project document developed by the Proposal or Bid Manager to identify resources, schedules, and tasks needed to reach the final submission date with a winning proposal.
Proposal Mind Map	Writing Plan, Storyboard, Proposal Planning Framework, Mock-Up, Annotated Outline, Bid Directive, Bid Plan, Mind Map	A visual representation of an outline created using mind mapping software or by drawing a diagram. Mind maps typically start in the center of the page with the proposal title, branch out with main topics or headings, and continue to radiate out from the branches as requirements are identified. The use of colors, images, symbols, and icons throughout mind maps helps annotate the outline and create a compelling story. This is a creative way to brainstorm ideas when working in a collaborative setting.
Proposal Outline	Writing Plan, Storyboard, Content Plan, Proposal Planning Framework, Mock-Up, Annotated Outline, Bid Directive, Bid Plan, Mind Map	A framework for content and organization based on customer requirements. The outline may be annotated to show writing responsibilities and page allocations or limits.
Proposal Planning	Pre-Proposal Planning	The process of planning a bid or proposal effort based on an opportunity plan and concurrent with the positioning and sales effort.

Term	Equivalent or Corresponding Terms	Definition and Additional Information
Proposal Process		A systematic series of scalable actions or steps directed to winning bids.
Proposal Process Tailoring		Proposal processes can be tailored to meet the unique needs of specific opportunities. The decision to apply situation-specific best practices considers the scale, scope, complexity, and risk of the proposal effort.
Proposal Resource Schedule		A task-based plan that identifies the period of time required to complete each task.
Proposal Responsibility Matrix		A document that identifies proposal team members and their specific proposal section responsibilities. It maps proposal team members (authors) with specific proposal (section) assignments. The proposal responsibility matrix is an element of the project plan developed by the Proposal or Bid Manager to identify resources, schedule, and tasks needed to reach the final submission date with a winning proposal.
Proposal Risk		Risk associated with an offeror's proposed approach in meeting the customer's requirements.
Proposal Strategy Development	Win Plan	The process of developing the proposal strategy that will appear in the response document.
Proposal Strategy Review	Pink Team, Storyboard Review, Writing Plan Review, Content Plan Review	A review of the content plan. The proposal strategy review validates the execution of the bid strategy for writers and verifies compliance with customer requirements. This task can be done by reviewing content development tools, such as content plans, a writing plan, storyboards, mock-ups, an annotated outline, or an early draft of the proposal.
Proposal Strategy Statement(s)	Sales Strategy	Statement(s) developed from the opportunity plan to emphasize strengths, mitigate weaknesses, downplay competitor strengths, and highlight competitor weaknesses. Each statement should contain supporting evidence and be placed in the content plan to help guide writers and to ensure consistency of the proposal strategy throughout the document. In small settings, where opportunity plans and content plans may be less formal, the focus should be on translating win strategies to well-supported proposal strategies.
Protest		Written objection by an interested party to a solicitation, cancellation of a solicitation, contract award, or termination of a contract award.

Term	Equivalent or Corresponding Terms	Definition and Additional Information
Quality Assurance (QA)		The systematic activities implemented in a quality system so that quality requirements for a product or service (e.g., a proposal) will be fulfilled. It is the systematic measurement, comparison with a standard, monitoring of processes, and associated feedback loop that promotes error prevention.
Reactive Proposal	Solicited Proposal	A proposal generated following a customer's formal request.
Relevant Experience		Experience that is comparable in goals, size, scope, magnitude, and complexity to the contract being bid upon.
Request for Information (RFI)		A customer document used at an early stage of a procurement to create a list of viable bidders who will later be invited to render an offer or respond to an RFP.
Request for Proposal (RFP)	Tenders, Call for Proposals (CFP), Request for Applications (RFA), Invitation for Bid (IFB), Request for Grant; Call for Quotes (CFQ), Advertisement for Bids (AFB)	The Government's standardized document for requesting negotiated bids. In more general terms, it is an announcement from a customer or funding source that is seeking proposals for a specific program, project, or work effort.
Requirements Checklist		Similar to a compliance checklist but can be self-generated when there is no written customer requirement. You may use it as a tool to monitor progress. A requirements checklist is a list of every solicitation requirement that you must satisfy to submit a compliant proposal.
Resource Estimate		An approximation of all costs incurred to produce a proposal, which may include outsourced services, such as desktop publishing, graphic design, editing, consultants, color reviewers, equipment, supplies, food, support staff, lodging, and travel.
Response Matrix		A derivative of the compliance matrix. It is a roadmap for evaluators, pointing to specific proposal responses for each compliance item. The matrix may also contain a summary response. It identifies where in the proposal you have addressed each of the solicitation requirements.

Term	Equivalent or Corresponding Terms	Definition and Additional Information
Reviews (General)	Color Team Reviews, Quality Checks, Proofing, Consistency Checks, Strategy and Execution Reviews, Sales Reviews of Documents	Periodic assessments of the quality of proposals as they progress through the proposal development process. Reviews are a key tool used by mature organizations. These organizations design their reviews to check key bidding success factors at the appropriate time in the business development cycle. The number and make-up of reviews depends on: • Length of the bid cycle • Complexity of the bid • Significance of the bid • Risk factors involved • Investment required to respond
RFP Shaping		The process of influencing customers' thinking in your favor to get elements of an upcoming RFP to reflect your company's key discriminators.
Rhetoric		The discipline that deals with the use of discourse, either spoken or written, to inform or persuade an audience.
Risk Management		Your strategy for managing and mitigating the risks (e.g., technical, financial, and schedule) inherent in a proposal bid. The underlying assumptions are that every offer entails risk and that risk can be contained or reduced with appropriate management.
Risk Management Methods		Methods used to categorize and plan the management of proposal development and delivery risk. Methods include accept, mitigate, transfer, and avoid.
SMART		A mnemonic tool commonly used to test the quality of opportunity plan actions. The letters correspond to the words specific, measurable, attainable/achievable, relevant, and time-sensitive/time-based.
Solicited Proposal	Reactive Proposal	A proposal developed following a formal request by the customer. Your organization may respond to a solicited proposal whether or not there has been previous active contact with the customer.
Solution	Problem Resolution, Design, Method of Provision, Solution Statement	Successful outcomes of the customer's problems on the customer's terms.

Term	Equivalent or Corresponding Terms	Definition and Additional Information
Statement of Work (SOW)	Work Details, Service Descriptions, Services to Be Provided	The portion of a solicitation that clearly and concisely defines the requirements of the specific work to be accomplished. SOW provides the technical and management details of how the customer wants the proposed products or services to be designed, produced, delivered, implemented, and managed.
Strengths, Weaknesses, Opportunities, and Threats (SWOT)	Threats, Opportunities, Weaknesses, Strengths (TOWS)	The analysis performed by organizations to address competitive positioning and identify the outcomes needed to develop a compelling proposal response that wins the business. SWOT emphasizes the internal environment. TOWS emphasizes the external environment.
Style Sheet	Style Guide, Template	A set of standards developed specifically for a particular proposal that editors and writers can use to ensure consistency in style, grammar, terminology, and mechanics, such as naming conventions, abbreviations, acronyms, response tone, and approach. Design style sheets are developed at five levels. These levels are line level, paragraph level, page level, graphics level, and document level.
Subject Matter Expert	Domain Expert	A person who is a recognized authority on a particular area or topic. SMEs are often important contributors of proposal content.

Term	Equivalent or Corresponding Terms	Definition and Additional Information
Subreviews	Vertical Reviews, Horizontal Reviews, Visual Reviews, Compliance Reviews	Specific subreviews are used to enhance proposals. Generally, reviewers are assigned to specifically look at the storyline alone (e.g., themes and action captions), compliance alone (i.e., does the proposal cover everything required?), and graphics alone for clarity, messaging, and proof. For example: • <i>Vertical reviews</i> examine sections indepth for compliance, responsiveness, and persuasiveness. Most detailed, constructive comments result from this type of review. • <i>Horizontal reviews</i> examine a specific aspect of the proposal across all sections. For example, one horizontal review may review theme statements. Another horizontal review may look at headings and the outlining approach by layer. A third review could look at callouts and other forms of highlighting to ensure they are employed consistently throughout. • <i>Visual reviews</i> are a form of horizontal review that examines visuals and graphic elements, including action captions, for consistency and effectiveness. • <i>Compliance reviews</i> evaluate the entire proposal against the compliance checklist to be sure it is in compliance with all the requirements stipulated in the RFP.
Supplier		An organization that provides products and services to customers.
Tacit Knowledge	Implicit Knowledge	The unstated knowledge that people carry in their heads. Tacit knowledge can be shared through discussion, storytelling, and personal interactions or drawn from its owners through interviews and questionnaires. Tacit knowledge has two dimensions. These are one's technical skills, or know-how, and cognitive skills, including beliefs, ideals, values, and mental models.
Tactics	Actions	Steps or tasks taken to achieve an objective.
Tangible Value		Your customer's perception of what the product or service you are proposing is worth to them. Tangible value can be quantified numerically as money saved, time saved, percent improvement, and numbers of savings/reductions.
Taxonomy		A hierarchical structure used for categorizing a body of information or knowledge, allowing an understanding of how that body of knowledge can be broken down into parts and how its various parts relate to each other.

Term	Equivalent or Corresponding Terms	Definition and Additional Information
Teaming Partners		Companies or organizations that agree to jointly pursue an opportunity to better address the customer's requirements. Teaming partners can range from subcontractors to the members of a new joint-venture organization.
Technical Section	Design Section, Solution Details	The section that details the products or services the customer wants or the technical and operational requirements your solution is required to satisfy. It includes a technical approach describing what your solution provides, how you provide it, and how your customer benefits from what you are proposing.
Telegraphic Heading		Headings that identify content only. Most of these are dictated in the solicitation as major or standard proposal sections. They cue evaluators to the overall organization of the proposal and the various levels of information provided.
Theme Statement		A short articulation to the customer of the main point in a proposal section, typically linking a discriminating feature to a benefit.
Topical Outline	Writing Plan, Storyboard, Proposal Planning Framework, Mock-Up, Annotated Outline, Bid Directive, Bid Plan, Mind Map	A proposal framework that identifies major subjects by heading.
Total Cost of Ownership	Life Cycle Cost	Consideration of all direct and indirect costs associated with a proposed solution over its entire life cycle.
Transitions		Words, phrases, and even sentences that connect one idea or sentence to another. Transitions indicate relationships of time, cause and effect, space, addition, comparison, and contrast. One way to write effective transitions is to link new information with information a reader already knows. This creates cohesion between paragraphs.
Unsolicited Proposal	Proactive Proposal	A proposal generated following informal discussions with the customer, generally following a sales visit or telephone call in which a customer requirement is discovered.
Value Proposition		A statement in a proposal that specifically addresses how aspects of an offer positively affect the customer's business. Value propositions should provide customer-specific statements that are quantified and describe tangible and intangible value.

Term	Equivalent or Corresponding Terms	Definition and Additional Information
Win Rate	Win Ratio, Win Rate (for Various Categories of Bids, Proactive Proposals, Competitive Proposals, Incumbent Proposals, Prime Versus Subcontractor, Company Defined Pursuit Categories, Product/Service)	The ratio of opportunities won to opportunities submitted, expressed as a percentage. However, this ratio can be misleading. More mature organizations track additional win/loss data, such as no-bids and bids withdrawn by bidder, as well as opportunities pending decision and those canceled by the customer. When used appropriately, these additional metrics provide better insight into actual performance.
Win Strategy	Sales Strategy, Opportunity/capture Strategy, Action Strategy, Pursuit Strategy	The collection of tactical strategies and actions developed following a pursuit decision and documented in an opportunity plan to win a specific defined opportunity.
Win Themes		The components of a proposing organization's win strategy. A win strategy can be made up of multiple win themes. A win theme must contain a feature, a benefit, and a corresponding proof point. Win themes should be reinforced throughout a proposal.
Work Breakdown Structure (WBS)		A deliverable-oriented grouping of project elements that organizes and defines the total work scope of the project. Each descending level represents an increasingly detailed definition of the project work.