

WE EMPOWER
Learning

2022

SHIPLEY
TRAINING CATALOG



ShipleyAssociates[®]

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Shipley Certification

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

Shipley Business Winning Certification

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

- Capture Management
- Proposal Management
- Proposal Writing

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

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

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



ShipleyUniversity®

6 CORE units	4 ELECTIVE units	CERTIFIED
Capture Management Proposal Management Proposal Writing (online or classroom)	Pricing to Win Cost Volume Executive Summaries Foundations (APMP) Qualifying to Win Self-Paced Courses	

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

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



Shipley Business Winning digital badge requires completion of core courses plus elective training courses.

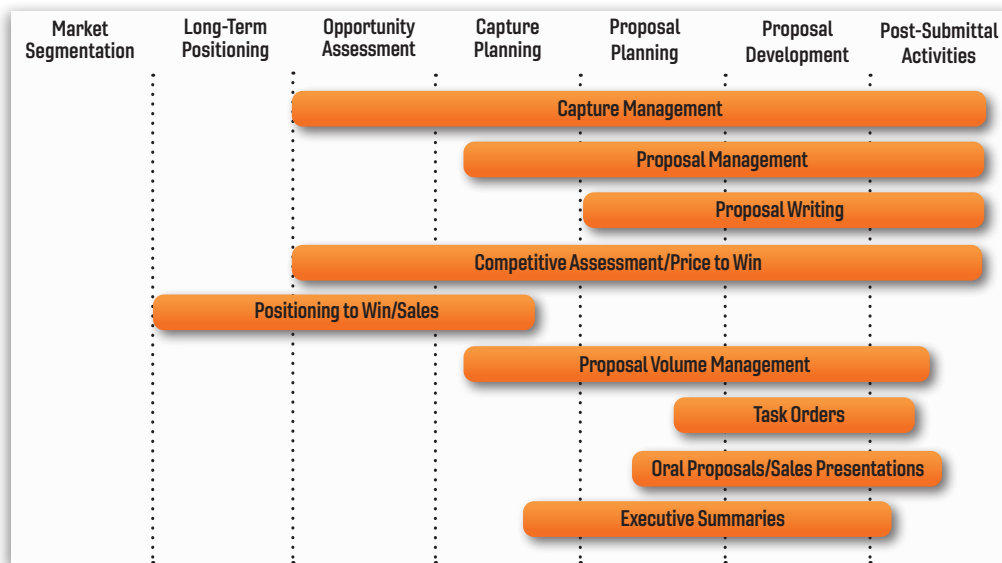
OVERVIEW *of* SERVICES



Professional Training and Development

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

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



Capture and Proposal Consulting Solutions

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

Core Courses for Certification

6 learning units

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

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



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

Writing Federal Proposals

Course Overview

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

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

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

Workshop Description

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

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



ShipleysAssociates Proposal Guide™

The ShipleysAssociates Proposal Guide™ contains over 50 topics. Each topic section provides a summary of key points.

Who Should Attend

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

Workshop Length

- 2 Days
- 2 ShipleysAssociates University® Units

Workshop Material

- Workshop Manual
- *ShipleysAssociates Proposal Guide™*

POWeRful™ Proposal Writing (Live, Online)

Course Description

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

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

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

learn through a series of three live, 1 1/2 hour virtual sessions with an instructor. Use a case study to complete assignments, readings, and a final exam and exercise. You will also receive valuable instructor feedback on your final proposal section submission.

Course Structure and Schedule

You will work on case study assignments throughout the one-day course. Understanding of key learning objectives will be evaluated based on an end-of-course exam and final proposal section submission.

- **Section 1:** *Characteristics of Effective Proposals, Proposal Planning and Proposal Organization*
- **Section 2:** *Writing Compelling and Customer-Focused Content*
- **Section 3:** *Examining and Reviewing Content to Improve Readability and Evaluation Scores.*

The end-of-course exercise will be a draft proposal section submitted for instructor review.

Workshop Material

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

- 10 APMP CEUs

- Counts as 2 Units toward Shipleys University Certification

Completion Criteria

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

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

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

Actual comments from ShipleysOnline® participants

POWeRful™ Proposal Writing (Live, Online)

Course Outline

A blended learning course that helps learners understand and practice the process, techniques, and tools necessary to develop customer-focused proposal content.

Pre-Course: Course Introduction and Case Study Review

Section 1: Understanding Characteristics of Effective Proposals

- Purpose of Proposals—A key sales tool
- Proposal Characteristics—Understanding the necessary elements of a winning proposal
- Plan Your Proposal—Planning based on customer needs, hot buttons, and requirements
- Organize your proposal for ease of evaluation and to ensure compliance.

Section 2: Writing the Proposal

- Developing a win strategy based on discriminators
- Creating effective theme statements
- Reflecting principles of customer focus in each proposal and every section
- Leveraging visuals to help sell your message
- Drafting your message using persuasive techniques
- Leveraging style sheets to support your brand
- Mocking Up Your Draft—Converting your content into a page-for-page representation

Section 3: Examining and Revising the Proposal

- Engaging Reviewers—Determining the best team for reviewing proposal content at key stages of proposal development

- Reviewing Proposals—Understanding the importance of proposal reviews to validate win strategy, compliance, responsiveness, and competitiveness within the proposal, prior to submission
- Guidelines for Improving Readability and Probability of Winning—Applying proven best practices for customer-focused writing

Post-Course: An exam to test your understanding of key terms and best practices and a short draft proposal submission. You also have access to the award-winning *Shibley Proposal Guide*, as well as necessary tools and templates.

Tools and materials included:

- Digital version of Shibley Proposal Guide
- Copies of all slides and screenshots
- Access to downloadable tools and templates:
 - Section Planner
 - Section Organizer
 - Mock-up Template
 - Review Checklists
 - Proposal Assessment Tools

Application exercises are part of this online course. Learners are expected to complete all exercises within the timeframe of the course schedule.

Managing Federal Proposals

Course Overview

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

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

Workshop Description

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

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

You will learn to:

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



Shipleys Proposal Guide™

The Shipleys Proposal Guide™ contains over 50 topics. Each topic section provides a summary of key points.

Who Should Attend

- Anyone who manages government proposal efforts

Workshop Length

- 2 Days
- 2 Shipleys University™ Units

Workshop Material

- Workshop Manual
- *Shipleys Proposal Guide™*

Managing Strategic Proposals

1-Day Online Course

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

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

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

Course Description

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

Break 1 – 1 hour

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

Session 1 (1.5 hours):

Managing the Proposal Planning Phase

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

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

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

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

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

Break 2 – 1 hour

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

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

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

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

Final Assignment: Due in one week

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

Application exercises are part of this online course. Learners are expected complete all exercises within the timeframe of the course schedule.

Workshop Material

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

Completion Criteria

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

Who Should Attend:

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

Capturing Federal Business

Course Overview

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

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

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

Workshop Description

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

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

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



Shipleys Capture Guide™

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

Who Should Attend

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

Workshop Length

- 2 Days
- 2 Shipleys University™ Units

Workshop Material

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

Capturing New Business (Online)

1-Day Online Course

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

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

Course Description

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

Pre-Course: Case Study Review

- Review a customer opportunity case study

Session 1 (1.5 hours):

Identifying and Qualifying Opportunities

Lesson 1: Identifying and Qualifying Opportunities

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

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

Break 1: 1-hour to review materials

Assignment: Use Pwin Calculator to calculate the case study Pwin

Session 2 (1.5 hours):

Capture Planning

Lesson 2: Capture Planning

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

- Complete an Internal Assessment—Review your own organization's approach and track record in the market, your strengths and weaknesses, your solution and discriminators, and past performance
- Compare Bidders—Use a Bidder Comparison Matrix to evaluate how you compare with your competitors

Break 2: 1-hour

Assignment: Update the Pwin. Complete a bidder comparison chart

Session 3 (1.5 hours): Developing the Win Strategy

Lesson 3: Developing the Opportunity Win Strategy

- Develop the Win Strategy—Analyze the bidder comparison results to develop strategies for leveraging strengths, mitigating weaknesses, neutralizing competitors' strengths, and exploiting their weaknesses
- Make the Preliminary Bid Decision—Follow a checklist to determine a preliminary bid decision, based on what you know, and update your Pwin

- Update the Capture Planner—Add internal assessment, bidder comparison, and win strategy to your tool
- Execute the Appropriate Action Plans—Use action plans to move your organization forward
- Present the Plan to Leadership—Prepare an Executive Summary to present what you have so far

Final Assignment: Prepare a short briefing to management outlining your capture plan.

Post-Course: A final exercise using a Capture Plan template. You also have access to the award-winning Shipleys Capture Guide, as well as necessary tools and templates.

Workshop Material

- All course materials will be accessible through the ShipleysOnline™ LMS
- Each lesson is based on best practices and topics in the *Capture Guide*; an electronic copy of this guide will be provided with the course materials
- The lesson slides will be downloadable for your use
- Shipleys Capture Workbook (MS Office tools)

Completion Criteria

- Active participation in all 3 live course sessions
- Submission of all quizzes and written assignments
- A minimum score of 70% on the final exam

Who Should Attend:

- Anyone who is responsible for capture planning and capture strategy.

Elective Courses for Certification

6 learning units

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

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



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

Pricing to Win

Course Overview

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

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

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

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

Workshop Description

The 2-day workshop teaches skills related to:

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



Shipleys Capture Guide™

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

Who Should Attend

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

Workshop Length

- 2 Days
- 2 Shipleys University® Units

Workshop Material

- Workshop Manual
- *Shipleys Capture Guide™*

Qualifying to Win: *Improving Your Pwin*

Course Overview

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

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

Workshop Description

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

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

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

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

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



Shipleys Capture Guide™

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

Who Should Attend

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

Workshop Length

- 1 Day
- 1 Shipleys University™ Unit

Workshop Material

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

Winning Executive Summaries

Course Overview

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

Course topics include:

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

Workshop Description

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

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

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

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



Shipleys Proposal Guide™

The Shipleys Proposal Guide™ contains over 50 topics and model documents. Each topic section provides a summary of key points.

Who Should Attend

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

Workshop Length

- 1 Day
- 1 Shipleys University™ Unit

Workshop Materials

- Workshop Manual
- *Shipleys Proposal Guide™*

Winning *in the* Cost Volume

Course Overview

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

- Accurate, acceptable, and clearly described pricing methodology and pricing techniques
- Consistency between the cost and non-cost volumes
- Supportable Basis of Estimates (BOEs)
- Narrative that includes strategic messaging that goes beyond simply explaining the numbers
- Including overall and cost volume executive summaries

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

Workshop Description

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

- Understand typical cost volume content and organization
- Understand how cost volumes are evaluated and what increases cost in evaluation
- Learn optimal pre-RFP and post-RFP timing for cost volume activities
- Learn how pricing to win influences cost volume strategy
- Learn to develop a WBS and WBS dictionary
- Learn various estimating techniques
- Learn how to write a compelling cost volume narrative and executive summary with strategic value



Shipleys Proposal Guide™

The Shipleys Proposal Guide™ contains over 50 topics and model documents. Each topic section provides a summary of key points.

Who Should Attend

- Account Managers
- Sales Professionals
- Proposal Managers
- Capture Managers
- Anyone who contributes to Cost Volumes

Workshop Length

- 1 Day
- 1 Shipleys University™ Unit

Workshop Material

- Workshop Slides and reference materials
- *Shipleys Proposal Guide™*

Winning *Through* Oral Proposals

Course Overview

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

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

Workshop Description

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

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

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

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



Shipleys Proposal Guide™

The Shipleys Proposal Guide™ contains over 50 topics and model documents. Each topic section provides a summary of key points.

Who Should Attend

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

Workshop Length

- 2 Days
- 2 Shipleys University™ Units

Workshop Material

- Workshop Manual
- *Shipleys Proposal Guide™*

Winning *With* Past Performance

Course Overview

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

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

Workshop Description

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

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

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



Shipleys Proposal Guide™

The Shipleys Proposal Guide™ contains over 50 topics and model documents. Each topic section provides a summary of key points.

Who Should Attend

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

Workshop Length

- 1 Day
- 1 Shipleys University™ Unit

Workshop Material

- Workshop Manual
- *Shipleys Proposal Guide™*

Winning *with* Task Orders

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

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

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

Workshop Description

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

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

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



Shipleys Proposal Guide™

The Shipleys Proposal Guide™ contains over 50 topics and model documents. Each topic section provides a summary of key points.

Who Should Attend

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

Workshop Length

- 1 Day
- 1 Shipleys University™ Units

Workshop Material

- Workshop Manual
- *Shipleys Proposal Guide™*

Blueprint to Winning

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

Yet some companies consistently outperform others.

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

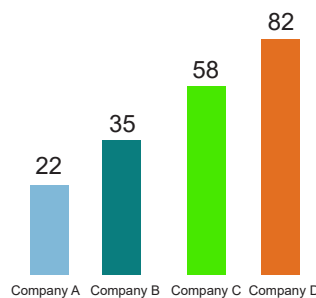
Shipleys *Blueprint to Winning*

addresses this paradox in an intensive 1-day seminar

for business development

executives or individuals who aspire to be recognized as industry leaders.

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



The *Blueprint for Winning*, developed with the assistance of your Shipleys facilitator, can produce even more significant win rates in the very short term.

What to Expect in the Engagement

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

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



Shipleys' Guidebooks are available for ongoing reference and guidance.

Who Should Attend

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

Session Material

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

Winning Color Team Reviews

Course Overview

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

You will learn to:

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

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

Examples of reviews we address during the workshop include:

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



Shipleys
Capture Guide™



Shipleys Business
Development
Lifecycle Guide™

Who Should Attend

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

Workshop Length

- 1 Day
- 1 Shipleys University™ Unit

Workshop Material

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



Learn from
Anywhere



Content Planning

Using Storyboards and Mockups

Course Overview

Content planning early in the proposal development process saves time and resources. Unclear thinking and planning equals unclear and confusing writing.

Proven planning methods help proposal contributors plan, develop, and integrate key concepts prior to writing proposal text. Participants learn to use annotated outlines and storyboarding templates. Learning to apply these methods reduces rework and improves document quality and the overall probability of winning (Pwin).

Topics include:

- Using templates to develop key message points and help with content planning
- Applying planning techniques to help ensure compliance and responsiveness
- Drafting key theme statements, graphic action captions, and determining page counts, formats, and assignments.
- Helping proposal contributors to develop content plans and mock-up storyboards for proposal sections

Participants have access to the *Shipleys Proposal Guide* to supplement learning and reinforce key best practices.

Benefits of Shipleys Learning

Through Shipleys, professionals have access to a broad range of learning topics in a variety of formats, including: live virtual courses, in-person classes, and self-paced, on-demand courses.

All learning is based on industry best practices from a variety of industries and market segments. Techniques and training content is regularly updated and refreshed to be current with best practices. Our blended learning approach:

- Reinforces key concepts, principles, and best practices compiled from industry experts and practitioners
- Provides access to Shipleys's guidebooks for ongoing reference and guidance
- Includes simple, MS Office-based tools and templates
- Contributes toward Shipleys Certification and APMP continuing education units (CEUs)



Shipleys's Proposal Guide provides ongoing reference and guidance.

Who Should Attend

- All proposal contributors (including SMEs) and proposal managers.

Course Length

- 4-6 hours (online)

Materials and Tools

- *Shipleys Proposal Guide*
- Proposal Development Worksheet (PDW)
- Mock-up Template

Winning Executive Summaries

Course Overview

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

Course topics include:

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

Workshop Description

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

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

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

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



Shipleys Proposal Guide™

The Shipleys Proposal Guide™ contains over 50 topics and model documents. Each topic section provides a summary of key points.

Who Should Attend

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

Workshop Length

- 1 Day
- 1 Shipleys University™ Unit

Workshop Materials

- Workshop Manual
- *Shipleys Proposal Guide*™

Winning Color Team Reviews

Course Overview

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

You will learn to:

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

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

Examples of reviews we address during the workshop include:

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



Shipleys
Capture Guide™



Shipleys Business
Development
Lifecycle Guide™

Who Should Attend

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

Workshop Length

- 1 Day
- 1 Shipleys University™ Unit

Workshop Material

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

Shipleys Associates Self-Paced Learning

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

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



Now Available!

Foundations for Proposal Development

Proposal Kickoff Meetings

Theme Statement and Discriminators

Proposal Writing - POWeR™

Storyboarding and Mockups

Executive Summary Development

Color Team Reviews

Outlining

Task Order Responses

Pink Team Review

Proposal Graphics and Action Captions

Foundations *for* Proposal Development 2.0

Self-Paced Course Overview

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

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

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

Description

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

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

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

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

Course available to participant 120 days from purchase.



Shipleys Guidebooks are available for ongoing reference and guidance.



Shipleys is an Approved Training Organization with APMP.

Cost

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

Materials

- APMP Body of Knowledge—Available online at apmp.org
- Foundations Study Guide—Available on APMP Store

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

Proposal Kickoff Meetings

Course Overview

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

Additional topics include:

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

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

Benefits of Self-Paced Learning

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

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



Shipleys's Guidebooks are available for ongoing reference and guidance

Who Should Attend

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

Module Length

- Approximately 90 minutes (self-paced)

Cost

- \$89

Course Subscription

- One year

Theme Statements *and* Discriminators

Course Overview

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

Topics include:

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

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

Benefits of Self-Paced Learning

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- Reinforcement of key concepts, principles, and best practices contained in Shipleys training
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- Industry-tested and proven best practices
- Convenient log-in to learning sites wherever you have web access



Shipleys Guidebooks available for ongoing reference and guidance

Who Should Attend

- This module is designed for proposal contributors.

Module Length

- Approximately 45 minutes (self-paced)

Cost

- \$89

Course Subscription

- One year

Proposal Writing — POWeR™

Course Overview

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

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

Benefits of Self-Paced Learning

Topics include:

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

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



Shipleys Guidebooks are available for ongoing reference and guidance.

Who Should Attend

- This module is designed for proposal contributors.

Cost

- \$89

Module Length

- Approximately 45 minutes (self-paced)

Storyboarding *and* Mockups

Course Overview

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

Topics include:

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

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

Benefits of Self-paced Learning

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

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



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

Who Should Attend

- This module is designed for Proposal Managers and contributors.

Module Length

- Approximately 45 minutes (self-paced)

Cost

- \$89

Course Subscription

- One year

Executive Summary Development

Course Overview

Whether you sell to governments or other businesses, offer products or services, work for a large, established organization or a small start-up, *Executive Summary Development* will give you the knowledge and tools to enhance your performance. *Executive Summary Development* teaches you how to plan and write executive summaries that improve the effectiveness of your proposals and other business development documents by:

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

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

Benefits of Self-Paced Learning

Topics include:

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



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

Who Should Attend

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

Cost

- \$89

Module Length

- Approximately 45 minutes (self-paced)

An Overview of Color Team Reviews

Course Overview

Many organizations conduct color team reviews or similar activities as part of their business development and proposal processes.

These reviews are designed to help select the right opportunities to bid, confirm win strategies, address proposal and performance risk, and support development of high quality, winning proposals.

This interactive eLearning course introduces participants to color team reviews that have been proven to help offerors increase their win probability on must-win Federal proposals.

You will learn:

- Where color teams fit in the business development process
- Reviewers and Assignments: How to get the most out of a color team review

This course includes a short quiz at the end.

Students also have access to applicable *Shipleys Proposal Guide* sections to supplement learning and reinforce key best practices.

Benefits of Self-Paced Learning

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

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



Shipleys Guidebooks available for ongoing reference and guidance

Who Should Attend

- This module is designed for proposal contributors.

Cost

- \$89

Course Subscription

- One year

Module Length

- Approximately 45 minutes (self-paced)

Pink Team Reviews

Course Overview

The *Pink Team Reviews* storyboards, mockups, or writing plans created to respond to proposal requirements. The team seeks to validate or correct the proposal approach NOW, before writing starts.

This interactive eLearning course teaches participants of the purpose and value of the Pink Team review and reviews how to conduct a review. Participants are introduced to tools for conducting the Pink Team review.

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

Benefits of Self-Paced Learning

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

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



Shipleys Guidebooks available for ongoing reference and guidance

Who Should Attend

- This module is designed for proposal contributors.

Cost

- \$89

Course Subscription

- One year

Module Length

- Approximately 45 minutes (self-paced)

Outlining

Course Overview

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

Workshop Description

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

- Remain compliant with the customer's instructions.
- Align the sales message with customer requirements and hot buttons.

- Place information where evaluators and customers with specific duties can easily find it.
- Identify sections in the proposal where the solution can be logically described.

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

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



Who Should Attend

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

Module Length

- Approximately 35 minutes (self-paced)

Cost

- \$69

Shipleys's Guidebooks available for ongoing reference and guidance

Winning *with* Task Orders

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

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

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

Workshop Description

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

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

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



Shipleys Proposal Guide™

The Shipleys Proposal Guide™ contains over 50 topics and model documents. Each topic section provides a summary of key points.

Who Should Attend

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

Workshop Length

- 1 Day
- 1 Shipleys University™ Units

Workshop Material

- Workshop Manual
- *Shipleys Proposal Guide™*

Proposal Graphics *and* Action Captions

Learn to create dynamic and persuasive proposal graphics and actions captions that support your proposals. This self-paced course will allow you access for one year. Go through the course as many times as you like within that year to learn the material and create graphics and action captions that rise above the rest and ultimately aid a winning proposal.

Help evaluator remember twice as much of what they see in a graphic after a single reading than what they read in text alone. This course will help you create graphics that give your proposal more meaning and emphasis. Combined with an action

caption, evaluators will remember your proposal and be more inclined to select your offer.

What you will learn:

- How visualization enhance your proposals
- The importance of action captions
- How to create persuasive action captions
- Design or modify graphic until they are understandable by all evaluators
- Select graphics that best support your message



Shipleys Guidebooks available for ongoing reference and guidance

Who Should Attend

- This module is designed for proposal contributors.

Module Length

- Approximately 45 minutes (self-paced)

Cost

- \$89

Course Subscription

- One year

Tools *and* Guidebooks

We offer a complete set of tools, reference guides, and templates that allow clients to implement best practices for efficiency and effectiveness. All guidebooks are available in digital format or hardcopy. These tools include:

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



ShipleysAssociates Proposal Guide

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

Updated Sections:

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

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

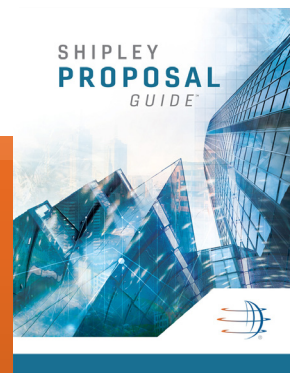
With over 40,000 copies in circulation, the *Shipleys Proposal Guide* has become a must for business development professionals at all levels with best practices covering over 60 communication topics. These best practices are the basis for the Foundation Level APMP (Association of Proposal Management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

The *Shipleys Proposal Guide* is immediately available as part of all Shipleys training workshops and for purchase directly from Shipleys at www.shipleyswins.com or by calling 888.772.WINS (9467).



Shipleys Proposal Guide™

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



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

Director, Solution Development Healthcare Management Co.

Shipleys Business Development Lifecycle Guide

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

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

- **Phase 0: Market Segmentation:** Evaluate your marketplace and identify segments of the market in which you want to compete.
- **Phase 1: Long-Term Positioning:** Identify and understand your marketplace, customers, and competitors and develop plans to build your resources, capabilities, and information bases.
- **Phase 2: Opportunity Assessment:** Assess current opportunities in the marketplace that match your capabilities.
- **Phase 3: Capture/Opportunity Planning:** Learn to craft a solution that meets not only the customer's explicit requirements but critical hot buttons as well.
- **Phase 4: Proposal Planning:** Understand the value of a collaborative relationship with the customer that creates a winning solution that targets the customer's needs.
- **Phase 5: Proposal Development:** Ensure your proposal is compliant, responsive, strategically sound, consistent among volumes, and produced on time.
- **Phase 6: Post-Submittal Activities:** Solidify your relationship with the customer and build trust in your ability to provide the services you detailed in your proposal.

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



Shipleys Business Development Lifecycle Guide™

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

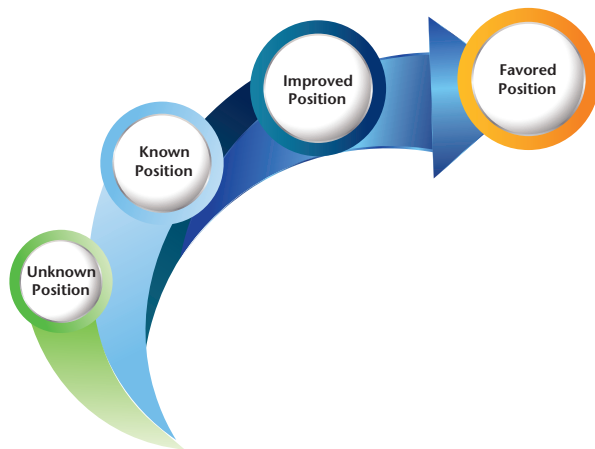


Now, you can access the best practice framework directly from the web or purchase the hardcopy guide for easy reference.

Shipleys Associates Capture Guide

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

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



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

Topics include:

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

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



Shipleys Capture Guide™

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



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

Shipleys Proposal Manager Playbook™

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

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

The Playbook is divided into three sections:

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

Downloadable tools included with the Playbook:

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

Win more business by making the Playbook work for you!



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

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Shipleys Capture Manager Playbook™

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

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

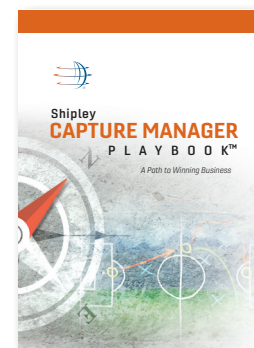
The *Shipleys Capture Manager Playbook* provides a successive approach and necessary tools for capture or opportunity managers to qualify for and win strategic opportunities. The *Playbook* identifies key milestones and decisions that are necessary to advance the sale and gain a competitive advantage.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

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

- **Opportunity Identification**—Detailed in this section are activities necessary to establish a place in the market, influence potential customers' perceptions, and help prospect for business opportunities.
- **Opportunity Assessment/Qualification**—This section includes tools and milestones to gain knowledge of the opportunity, the customer, and the competitive landscape and decide whether to begin an active pursuit.
- **Opportunity/Capture Planning**—Tasks focusing on preparing and implementing the capture plan and win strategies to influence the customer to prefer your solution are documented in this section.
- **Supporting the Proposal**—This section contains steps the capture manager should take to provide information about the opportunity and the customer to help the proposal team.

Win more business by making the Playbook work for you!

Downloadable
tools included!



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Shipleys Proposal Writer Playbook™

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

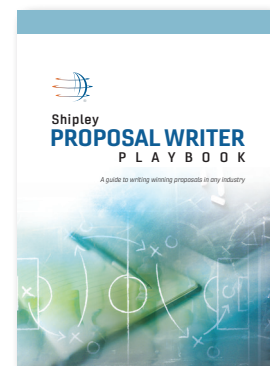
Included with the guide are these tools and templates:

- Proposal Section Planner
- Proposal Section Organizer
- Mockup Template
- Proposal Development Worksheet (PDW)
- Four-Box Organizer
- Proposal Outline
- Pink Team Assessment Form

- Pink Team Review Form
- Red Team Review Checklist
- Red team Scoring Guidance
- Red Team Review Form
- Red Team Horizontal Review
- Lessons Learned Review checklist
- Lessons Learned Survey
- White Hat Instruction
- White Hat Planner

Win more business by making the Playbook work for you!

Downloadable
tools included!



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