



# **PRACTITIONER AND CAPTURE PRACTITIONER EXAM PREPARATION GUIDE**

**(V 4.0)**

### Amendment history

Version 3.0 – June 2023

- Combined both Practitioner Exam Prep Guides into one document .
- Complete revision of content
- Removed glossary and sample exam (available online)

Version 4.0 – November 2023

- Refinement and reduction of repetitive information.

© 2023 Association of Proposal Management Professionals. All rights reserved.  
Confidential. Do not disclose without the written permission of the Association.



<b>Practitioner Exam Preparation Guide</b>	<b>1</b>
Preparation Checklist	2
<b>Section 1 - About the exam design</b>	<b>3</b>
Structure of the exam materials	4
<b>Section 2 - Preparing for the exam</b>	<b>5</b>
Use the sample exam to test your knowledge	5
To access the sample exam:	6
<b>Section 3 - Registering for and taking the exam</b>	<b>7</b>
Taking the exam	9
Exam instructions	9
Sitting the exam	9
Read each question carefully	9
Additional Advice	9
Candidates who have English as a first language	9
Candidates who DO NOT have English as a first language	9
Using the time during the exam	10
Access to the other materials during the exam	10
Maintaining your certification level	10
<b>Section 4 - Types of Questions</b>	<b>14</b>
Types of questions	14
<b>Section 5 - Alignment of the syllabus and the APMP BoK</b>	<b>19</b>
For Bid/Proposal Practitioner	19
For Capture Practitioner	27

# APMP Practitioner OTE Preparation Guide

## Practitioner Exam Preparation Guide

This guide provides you with the information that you will need to prepare for and take the APMP Practitioner exam as well as the APMP Capture Practitioner exam. This guide is not intended to replace the resources you need to prepare for the exam and using this guide does not guarantee that you will pass the exam.

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 a 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.
- for the APMP Practitioner exam:
  - o have achieved Foundation Certification.
- for the APMP Capture Practitioner exam:
  - o have a sponsor who recommends that you should be considered for the exam.
  - o have completed the Application and Sponsor Form (including the self-certification that you have studied the indicated elements of the APMP BoK).

The APMP Practitioner exams assess the knowledge and skills that demonstrate proficiency in capture management respectively 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.
- having experience with the APMP best practice as supported by the information contained in the APMP Body of Knowledge (BoK).

*Disclaimer: This guide is intended to provide only a general overview of the topics related to the APMP Practitioner exams. 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.*



# APMP Practitioner OTE Preparation Guide

## Practitioner Checklist

If you CANNOT check or complete all the items in the list below, then you may not be ready to take a APMP Practitioner exam. (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 APMP Practitioner 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 BoK and I have completed the self-certification element of my application.	0%	50%	100%
d. Appendix A – Extracts from the Sample Objective Test Exam. 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 (in the latest version). 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 three years of experience in the capture, sales, bid and/or proposal fields.		YES	
g. I have found my APMP membership number.			
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/CPDs (Continuing Education Units / Continuous Professional Development) in the specified period, once I have successfully passed the exam.		YES	

# APMP Practitioner OTE Preparation Guide

## About the exam design

The Practitioner exams 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).

# APMP Practitioner OTE Preparation Guide

## Structure of the exam materials

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 sections, called '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. part A, B or C. Each of the 'part-questions' will identify the portion of the exam 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:

**Unless it is clearly stated otherwise**, there is only one answer to each question-line. If more than one answer is given, the response line will be void.

# APMP Practitioner OTE Preparation Guide

## Preparing for the exam

The APMP Practitioner exams are based on facts and best practices defined within the APMP BoK. The important topics that candidates should study to prepare for the exam 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 tested in the exam.

### Use the sample exam to test your knowledge

As you prepare for an APMP Practitioner exam, you are encouraged to work through the SAMPLE EXAM. The sample exam is based on the same exam design as live papers, thus is representative of the live exams.

Use the sample exam to guide you in identifying any content areas you need extra time and resources to prepare for.

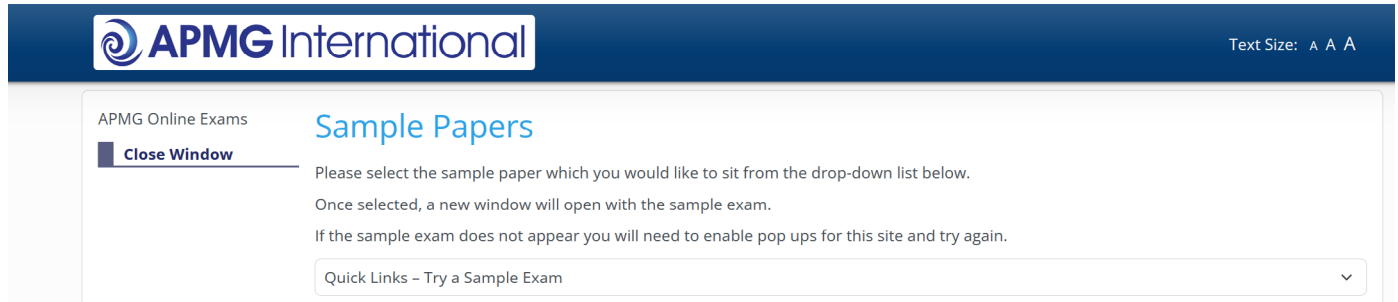


# APMP Practitioner OTE Preparation Guide

To access the sample exam:

<https://oea2022.apmg-international.com/Marlin/SamplePapers.aspx>

You should see this screen:

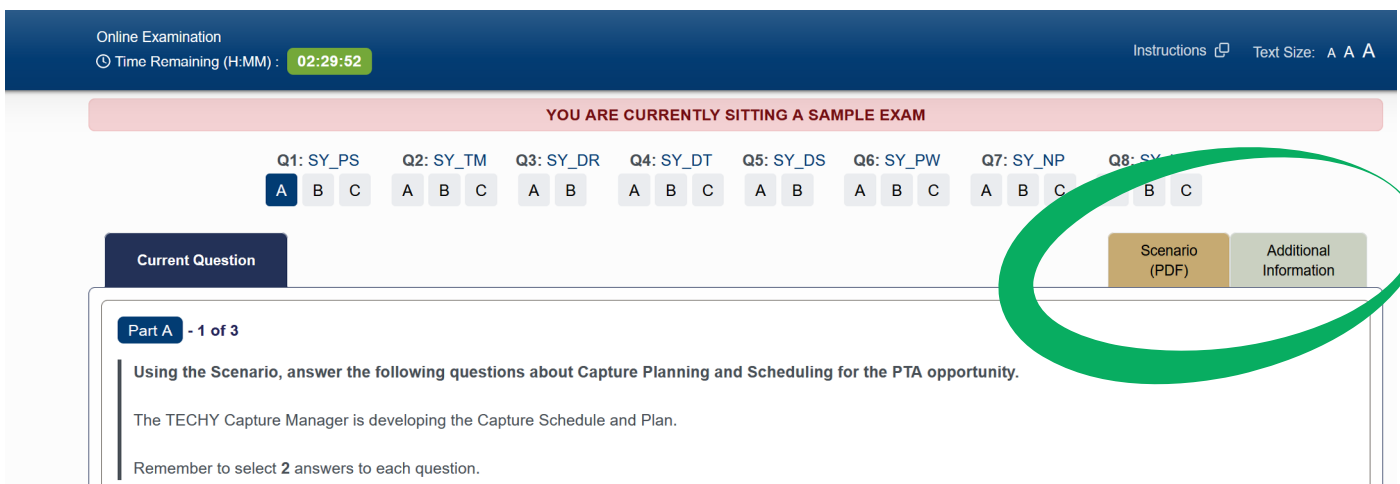


Select the correct exam:

- **APMP Capture Practitioner**
- OR:
- **APMP Practitioner**

Please review the instructions prior to starting the exam.

To call up the Scenario, which you should read first, you have to click on the tab 'Scenario (PDF)'. For some questions, there is also additional information to be found under the tab 'Additional Information'.



Analysis of your answers to the questions in the sample exam will help determine where you need to spend your study time.

# APMP Practitioner OTE Preparation Guide

## Preparing for the exam

If you are sitting the exams through an Accredited Training Organization (ATO), the exams are generally included in the course fee, please check with your ATO.

Otherwise you can book your exam via the APMG Public Exam Portal: <https://publicexambookings.apmg-international.com/>

In readiness for booking the exam, whether via your ATO or the Public Exam Portal, please have the following information ready:

### Before beginning you will need:

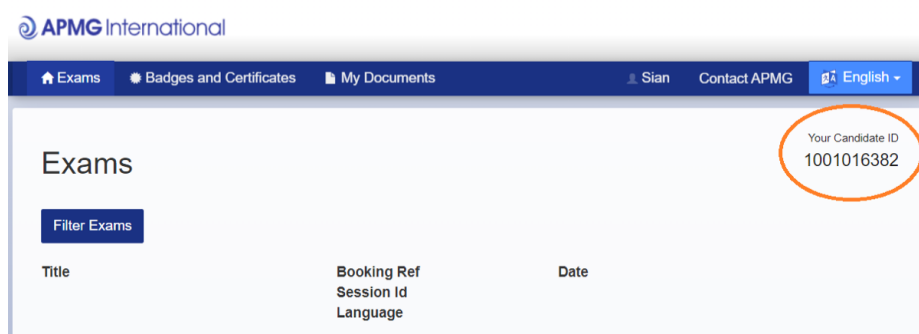
#### APMP membership ID number

- To find your APMP membership ID number, login to your membership profile at [apmp.org](http://apmp.org). If you cannot remember your APMP member profile credentials, you can request a password reset:
- Online: [Forgot Password](#)
- Email: [membership@apmp.org](mailto:membership@apmp.org) with the subject "Please Reset My APMP Password".
- Include your full name, and the email address you think is associated with your membership.

If you are booking a level that has a pre-requisite (Practitioner, Capture Practitioner, Professional), you will also require:

#### Candidate ID

This can be found by navigating to the Candidate Portal (<https://candidateportal.apmg-international.com/#/exams>), logging in, and locating the candidate ID on the homepage:



If you sat your exam pre-2019, you will need to locate your Candidate Number that begins with APMP/.....

Once the exam booking is created, you will be required to register for your exam with the APM Group (APMG). This is the organization that operates the exam platform and administers your candidate details. You will receive a registration email inviting you to register for the candidate portal. For the registration you will need to enter your personal details, this takes no longer than 15 minutes and can be completed at any time prior to the exam.

# APMP Practitioner OTE Preparation Guide

Once registered you can select 'Exam Preparation', here you will find the system requirements & link to the Sample Exam Portal. The 'Take Exam' button will be greyed out until the Invigilator/ Proctor has verified your ID.

If your exam has been booked via the ProctorU service, you can find more information here:

<https://apmg-international.com/info/exam-proctoring>

<https://www.proctoru.com/portal/apmg-international>

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

<https://apmg-international.com/contact>

**Important note:** At the point of purchasing the exam you can specify whether the exam is in a second language, or if you have any special requirements. If your exam is being provided via your ATO, please inform them of language or special requirements.

Please speak to your ATO or see our Equality Policy at <https://apmg-international.com/copyright-legal-policies> for further information. be completed at any time prior to the exam.

### Exam instructions

The exam instructions will be viewable once you have selected the 'Take exam' button in the candidate portal, or at the beginning of your paper exam. Please read the instructions carefully before starting your exam.

For online exams, Instructions can be accessed again at any time during the exam by selecting 'Instructions' in the blue bar at the top of the page.

Ask the invigilator, or proctor, for clarification if you are not sure about the instructions.

### 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.

Read the scenario carefully before you attempt any answer.

### Sitting the exam

It's important 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.

### Additional advice:

- Negative phrases (e.g. Choose the answer which DOES NOT describe).
- Judgment questions (e.g. Choose the BEST or MOST CORRECT answer).
- Multiple answers (e.g. Choose MORE than one).
- Don't leave any questions unanswered. There is no penalty for incorrect answers.

### 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 exam

The Practitioner and Capture Practitioner exams are open book, unrestricted materials. Notes can be taken on a wipe clean board only.

Candidates should be aware of the time constraint upon them. Whilst the APMP BoK is there for support, the questions have not been designed on the basis that candidates are required, or even expected, to refer to it to answer the questions.

## Maintaining your certification level

The APMP Certification for Practitioner qualifications will remain valid as long as the candidate records Continuous Professional Development (CPD) in their personal CEU/CPD Tracker on the APMP website. Further information can be found here:

<https://www.apmp.org/certification/maintaining-certification-ceus/>

### Types of questions

There are four different types of questions used within the exam. The following shows you the structure of each type of question.

#### 1. Classic Multiple Choice Questions - 'choose one from a list of three or four possible 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

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.

**2. Matching** - link items in one list to items in a second list'. There is only one correct response to each question, but options from the second list may be used once, more than once or not at all.

Using the Scenario, answer the following question.

Following the bid/no-bid decision, CSS has decided that its bid stands a good chance of winning the SOLACE Event Management opportunity.

The CSS Bid Manager is now reviewing the information provided by the Opportunity/Capture Manager from the SOLACE Opportunity/Capture Plan. Several critical pieces of information appear to be missing.

Column 1 contains a list of missing information about the SOLACE opportunity landscape. For each entry in Column 1, select from Column 2 the primary role responsible for gathering it. Each selection from Column 2 can be used once, more than once, or not at all.

	Column 1	Column 2
1	CSS win strategy.	<b>A</b> Account Manager.
2	Initial proposal planning for the SOLACE Event Management opportunity.	<b>B</b> Opportunity/Capture Manager.
3	WT content and collateral.	<b>C</b> Bid Manager.
		<b>D</b> Teaming Partner.

### 3. Multiple Response - 'choose two correct options from a list of five 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

- |          |  |
|----------|--|
| <b>1</b> | <p>Which <b>2</b> considerations are most important for the Capture Manager?</p> <ul style="list-style-type: none"><li><b>A</b> 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.</li><li><b>B</b> To avoid unnecessary rework, development of the capture strategy should be scheduled to begin after the PTA meeting in week 44.</li><li><b>C</b> Time should be built into the schedule to review and update the Capture Schedule to accommodate a changing competitive landscape.</li><li><b>D</b> 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.</li><li><b>E</b> Price-to-Win development should be scheduled to begin in week 32 and be completed by week 36</li></ul> |
|----------|--|



**4. 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 to 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
<b>A</b>	True	True AND the reason explains the assertion
<b>B</b>	True	True BUT the reason does not explain the assertion
<b>C</b>	True	False
<b>D</b>	False	True
<b>E</b>	False	False

	Assertion		Reason
<b>1</b>	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.
<b>2</b>	TECHY should first consider partnering with an organization they have previously worked with.	BECAUSE	Performing due diligence on teaming partners is critical.
<b>3</b>	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.

# APMP Practitioner OTE Preparation Guide

## Alignment of the syllabus and the APMP BoK

The following tables provide a cross reference list between the syllabus topics being tested in the APMP Practitioner exams.

They have been included to allow you to understand the competence areas that are to be tested in the exams and which sections 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.



## For Bid/Proposal Practitioner

Syllabus area	APMP BoK topic
1. Information Research, Management and Sales Orientation (IMSO)	
Able to apply and adapt the APMP Information Research, Management and Sales Orientation competencies to a given proposal/bid scenario.	
Identify the information required to complete an opportunity management plan	Opportunity/Capture Plan Knowledge Management
Create a plan to gather the information required, appropriate for the time available, <ul style="list-style-type: none"> <li>• The customer</li> <li>• The competition</li> <li>• Capability, including resource</li> <li>• Tool(s) to store information</li> </ul>	Opportunity/Capture Plan Management Customer Analysis and Competitive Analysis
Identify where and how the sales process interfaces with the business winning life cycle	Opportunity Management, Customer Relationship Management Introduction to the Business development Life Cycle End-to-End Process
Identify how and where sales methodology fits within the business development lifecycle	Opportunity/Capture Management Customer Relationship Management Introduction to the Business development Life Cycle End-to-End Process
Able to identify, analyze and distinguish between appropriate and inappropriate application of the APMP Information Research, Management and Sales Orientation competencies to a given proposal/bid scenario.	
Whether appropriate actions have been taken, and responsibilities assigned when interfacing and communicating with internal clients and external customers	Customer Relationship Management Opportunity/Capture Plan Management

# APMP Practitioner OTE Preparation Guide

Whether the relationship between an opportunity plan and the proposal is clear and the strategy within the opportunity plan can be used to drive proposal strategy and messaging	Linking Opportunity/Capture Plans with Proposal Content
Whether appropriate actions and responsibilities to facilitate the development and promotion of a win strategy have taken place, and that the win strategy has adapted to meet changing circumstances	Opportunity/Capture Plan Management Win Strategy
Whether appropriate actions have been taken within the sales process	Opportunity/Capture Management Customer Relationship Management Introduction to the Business Development Life Cycle End-to-End Process

<b>2. Planning and Management (PLM)</b>	
<b>Syllabus area</b>	<b>APMP BoK topic</b>
Able to apply and adapt the APMP Information Research, Management and Sales Orientation competencies to a given proposal/bid scenario.	
Develop a proposal schedule, including: <ul style="list-style-type: none"> <li>• resourcing requirements</li> <li>• scheduling metrics</li> <li>• activities and reviews</li> <li>• customer's timescales</li> <li>• cost estimate</li> <li>• risk</li> <li>• contingency</li> </ul>	Scheduling End to End Process Budgets Scheduling Production Management Managing External Risk Managing Internal Risk
Identify appropriate actions, roles and responsibilities when undertaking document reviews	Review Management Lessons Learned Analysis and Management

# APMP Practitioner OTE Preparation Guide

<p>Identify appropriate actions and responsibilities when managing risk management strategies for:</p> <ol style="list-style-type: none"> <li>1. proposal development</li> <li>2. solution</li> </ol>	<p>Managing External Risk Managing Internal Risk</p>
<p>Identify appropriate content of progress reports</p> <ul style="list-style-type: none"> <li>• schedule changes</li> <li>• resource changes</li> <li>• issues requiring resolution</li> <li>• possible need to revisit qualification</li> </ul>	<p>Scheduling Daily Team Management Stakeholder Engagement and Management</p>
<p>Identify the appropriate actions and responsibilities when planning and scheduling infrastructure and time required for proposal production, including appropriate selection of document styles, formats and visuals</p>	<p>Scheduling Production Management Page and Document Design</p>
<p>Identify lessons learned</p>	<p>Lessons Learned Analysis and Management</p>
<p>Identify appropriate actions and responsibilities to support the key elements of the proposal development process</p>	<p>Scheduling End-to-End Process</p>
<p>Identify appropriate actions and responsibilities to manage a virtual proposal process team</p>	<p>Virtual Team Management</p>
<p><b>Able to identify, analyze and distinguish between appropriate and inappropriate application of the APMP Planning and Management competencies for a given proposal/bid scenario. Specifically, to analyze, with reasons:</b></p>	
<p>Whether a proposal schedule is appropriate, and has adapted to reflect internal and external changes</p>	<p>Scheduling</p>

# APMP Practitioner OTE Preparation Guide

Whether document reviews have been undertaken appropriately to meet the size and type of opportunity and customer timescales	Review Management Lessons Learned Analysis and Management
Whether risk management strategies have been applied appropriately	Managing External Risk Managing Internal Risk
Whether the proposal development process and activities have been carried out appropriately for the situation and opportunity	Scheduling End to end process
Whether activities undertaken to manage a virtual proposal team are appropriate	Virtual Team Management
<b>3. Development (DV)</b>	
<b>Able to apply and adapt the APMP Development competencies to a given proposal/bid scenario. To understand:</b>	
The process to establish an early winning price target and a winning price strategy	Competitive Price To Win
<b>Able to apply and adapt the APMP Development competencies to a given proposal/bid scenario.</b>	
Identify the information required for an initial opportunity qualification decision	Gate Decisions End-to-End Process
Develop a quantified opportunity-specific value proposition that meets customer expectations, balancing value and price	Value Propositions
Determine suitable use of internal and/or external teaming partners, using appropriate tools, and facilitate the negotiation of teaming agreements <ul style="list-style-type: none"> <li>• Bidder Comparison Matrix</li> <li>• SWOT</li> </ul>	Customer Analysis and Competitive Intelligence

<p>Schedule and use analysis tools to identify and evaluate positive and negative discriminators to drive the development of proposal strategy statements</p>	<p>Strategy and Win Themes Customer Analysis and Competitive Intelligence Proposal Strategy Development</p>
<p>Identify the principles and key elements required to develop a customer-focused executive summary</p>	<p>Executive Summaries</p>
<p>Identify and develop the inputs required at a kick off meeting including:</p> <ol style="list-style-type: none"> <li>1. Opportunity Summary</li> <li>2. Customer Profile</li> <li>3. Proposal Strategy</li> <li>4. Proposal Operations</li> <li>5. Proposal Schedule</li> <li>6. Proposal Outline</li> <li>7. Writers' Packages</li> <li>8. Bid Request</li> <li>9. Draft Executive Summary</li> <li>10. Competitive Analysis</li> <li>11. Roles and Responsibilities</li> <li>12. Work Breakdown Structure (WBS)/WBS Dictionary</li> </ol>	<p>Kick Off Meeting Management</p>
<p>Identify the appropriate level of content planning required</p>	<p>Content Plans</p>
<p>Identify customer requirements and build a compliance matrix</p>	<p>Compliance and Responsiveness Compliance Matrix</p>
<p>Apply the principles and appropriate techniques of persuasive writing for different types of audiences, including the:</p> <ol style="list-style-type: none"> <li>1. Principles of writing clearly</li> <li>2. Benefits of designing structured documents</li> </ol>	<p>Persuasive Writing Writing Clearly Proposal Organization</p>

# APMP Practitioner OTE Preparation Guide

<p>Coordinate, organize and assign appropriate use of graphics, including:</p> <ol style="list-style-type: none"> <li>1. Customer-focused action captions</li> <li>2. Effectiveness of Illustration and action caption</li> <li>3. Highlighting benefits and discriminators</li> <li>4. Basic design principles</li> </ol>	<p>Graphics Page and Document Design Features, Benefits and Discriminators Headings</p>
<p><b>Able to identify, analyze and distinguish between appropriate and inappropriate application of the APMP Development competencies for a given proposal/bid scenario. Specifically, to analyze, with reasons:</b></p>	
<p>Whether the bid decision process has been applied appropriately, using a consistent method/tool to qualify an opportunity</p>	<p>End-to-End Process Gate Decisions</p>
<p>Whether the value proposition presented to a customer is appropriate</p>	<p>Value Propositions</p>
<p>Whether the most appropriate teaming partner(s) have been selected by applying analysis tools:</p> <ul style="list-style-type: none"> <li>• Bidder Comparison Matrix</li> <li>• SWOT</li> </ul>	<p>Customer Analysis and Competitive Intelligence</p>
<p>Whether a proposal strategy has been developed and assigned appropriately within the content plan</p>	<p>Win Strategy and Themes</p>
<p>Whether an Executive Summary is fit for purpose</p>	<p>Executive Summaries</p>
<p>Whether the content plan for a proposal is fit for purpose, contains the correct information to guide writers for its size and type, and has been developed appropriately</p>	<p>Content Plans Proposal Theme Statements Win Strategy and Themes</p>
<p>Whether a compliance matrix is fit for purpose and has been used appropriately</p>	<p>Gate Decisions Compliance and responsiveness</p>



Whether appropriate persuasive writing techniques have been applied for a given audience	Persuasive Writing
Whether the production and use of graphics is appropriate, including: <ol style="list-style-type: none"> <li>1. Customer-focused action captions</li> <li>2. Effectiveness of Illustration and action caption</li> <li>3. Highlighting benefits and discriminators</li> <li>4. Basic design principles</li> </ol>	Graphics and Action Captions Page and Document Design Features, Benefits and Discriminators Headings
<b>4. Behavior and Attitude (BA)</b>	
<b>Able to apply and adapt the APMP Behavior and Attitude competencies to a given proposal/bid scenario. Specifically, to:</b>	
Identify appropriate interpersonal styles and communication methods/media: <ul style="list-style-type: none"> <li>• interpretation of messages and responses</li> <li>• factors that affect the effectiveness of communication and potential barriers</li> <li>• understand and interpret situational needs and desired outcomes</li> <li>• appropriate ways to interact with prospective customers in manner that builds effective relationships</li> </ul>	Communicating with Others
Identify appropriate actions and responsibilities to check the quality of processes and tasks and take corrective action where necessary	Quality Management Project Management

# APMP Practitioner OTE Preparation Guide

Identify appropriate actions and responsibilities to develop and use strategic relationships and a successful team	Stakeholder Engagement and Management Daily Team Management Virtual Team Management
Identify appropriate actions and responsibilities to ensure effective decision making and delegation	Stakeholder Engagement and Management Daily Team Management Virtual Team Management
<b>Able to identify, analyze and distinguish between appropriate and inappropriate application of the APMP Behavior and Attitude competencies for a given proposal/bid scenario. Specifically, to analyze with reasons:</b>	
Whether interpersonal styles and communication methods/media have been used appropriately	Communicating with Others
Whether corrective action has been taken appropriately to support and maintain the quality of processes and tasks	Quality Management Project Management
Whether actions taken to build strategic relationships and successful teams are appropriate	Stakeholder Engagement and Management Daily Team Management Virtual Team Management
Whether decision making and delegation processes has been undertaken appropriately	Stakeholder Engagement and Management Daily Team Management Virtual Team Management

## For Capture Practitioner

Syllabus area	APMP BoK topic
<b>Opportunity Capture Planning and Scheduling</b>	
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 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

# APMP Practitioner OTE Preparation Guide

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

# APMP Practitioner OTE Preparation Guide

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
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

# APMP Practitioner OTE Preparation Guide

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
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

# APMP Practitioner OTE Preparation Guide

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
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

# APMP Practitioner OTE Preparation Guide

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 cos Competitive 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
Extend the opportunity capture strategy into the proposal strategy and conduct Opportunity Strategy Review	Develop Opportunity Capture Strategy Linking Opportunity capture plans to proposal content Reviews



# APMP Practitioner OTE Preparation Guide

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 Negotiation Strategy Development Managing questions to the customers Review Management
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	



# APMP Practitioner OTE Preparation Guide

Extend the opportunity capture strategy into the proposal strategy and conduct Opportunity Strategy Review	Develop Opportunity Capture 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 Negotiation Strategy Development Managing questions to the customers Review Management
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



# APMP Practitioner OTE Preparation Guide

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	Competitive Price To Win
Analyze the customer's budget, funding profile, and acceptable price range	Competitive Price To Win
Analyze and estimate the lowest-cost, acceptably compliant solution	Competitive Price To Win
Analyze and estimate the capability-satisfied solution	Competitive Price To Win
Analyze and estimate the value-driven solution	Competitive Price To Win
Use analyses and estimation results to determine the Price-to-Win	Competitive Price To Win
Prepare, review and implement a win strategy that integrates solution and Price to Win	Competitive Price To Win
Differentiate and communicate cost, price and value	Competitive Price To Win
Develop should-costs early	Competitive Price To Win
Develop objective evidence and rationale to minimize negotiated price reductions that may be requested	Competitive 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

# APMP Practitioner OTE Preparation Guide

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
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

# APMP Practitioner OTE Preparation Guide

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 Strategy Development Customer focused opportunity capture skills and tactics
Develop slides that are audience focused and compliment verbal messages rather than duplicate.	Developing and Delivering Presentations Persuasion Persuasive Writing Negotiation Strategy Development 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 Strategy Development Customer focused opportunity capture skills and tactics
Create visuals that are appealing to the audience.	Developing and Delivering Presentations Persuasion Persuasive Writing Negotiation Strategy Development Graphics

# APMP Practitioner OTE Preparation Guide

<p>Competently edit own and other's visuals to transform effectiveness</p>	<p>Developing and Delivering Presentations Persuasion Persuasive Writing Negotiation Strategy Development Graphics</p>
<p>Use slide animations effectively to enhance delivery and aid communication</p>	<p>Developing and Delivering Presentations Persuasion Persuasive Writing Negotiation Strategy Development Graphics</p>
<p>Develop accompanying handouts that enhance the audience experience and compliment the key messages</p>	<p>Developing and Delivering Effective Presentations Persuasion Persuasive Writing Negotiation Strategy Development Customer focused opportunity capture skills and tactics</p>
<p>Give constructive feedback to improve the quality of the presentation materials and performance of others</p>	<p>Developing and Delivering Effective Presentations Persuasion Persuasive Writing Negotiation Strategy Development Communications Opportunity capture team selection and management</p>
<p>Lead discussions to pre-empt and remove objections using appropriate techniques (objection handling)</p>	<p>Developing and Delivering Effective Presentations Persuasion Persuasive Writing Negotiation Strategy Development Customer focused opportunity capture skills and tactics Communications</p>

# APMP Practitioner OTE Preparation Guide

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 Strategy Development
Lead activity to prepare your negotiating range, and expected customer negotiation range.	Negotiation Strategy Development
Lead and manage buy-in and agreement on negotiation range with internal stakeholders prior to and during negotiations	Negotiation Strategy Development
Lead the activity to decide the opening position and the options that can be offered	Negotiation Strategy Development
Lead the negotiation team effectively; ensure each member is fully prepared for the negotiation; consistently secure positive outcome from the negotiation	Negotiation Strategy Development
Understand customer stakeholder's positions and bargaining power within negotiations	Negotiation Strategy Development Stakeholder Engagement and Management
Adjust personal positions and style quickly if circumstances change favorably and unfavorably; win concessions without damaging stakeholder relationship	Negotiation Strategy Development
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

# APMP Practitioner OTE Preparation Guide

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
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



# APMP Practitioner OTE Preparation Guide

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
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
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

# APMP Practitioner OTE Preparation Guide

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