



**Edition for
Bid / Proposal Managers**

**APMP Practitioner OTE
Preparation Guide (V 2.2)**



Amendment history

Version 1.0 – Baseline document.

Version 1.1 – Amended to change title to Preparation Guide and include suggested improvements from ATOs.

Version 1.2 – Amended for minor errors and omissions.

Version 1.3 – Amended to update section 5 to reflect current BoK references.

Version 2.0 – Amended to update the information about the Proctor / Invigilator role.

Version 2.2 – Amended to include easier to read tables of information in parts of Appendix A

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Objective Test Examination Preparation Guide

Introduction

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

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

- Be a member of APMP
- Have achieved Foundation Certification
- Have at least 3 years of experience in a bid/proposal environment

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

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

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

The questions in the APMP Practitioner OTE are more challenging because they are designed for practitioners with at least 3 years of industry experience in bidding and proposals.

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

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

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

Preparation Checklist

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

Checklist item	Completed (shade %)
. I have read and understood all the elements of this guide:	
a. Sections 1 to 3 – Preparing for and taking the exam. I know how to prepare for an OTE exam.	0% 50% 100% <input type="text"/>
b. Section 4 - Exam outline. I understand the types of questions that I will be asked to answer.	0% 50% 100% <input type="text"/>
c. Section 5 – Cross references between the syllabus and the APMP BoK. I have looked through all the relevant sections of the APMP Body of Knowledge and confirm that I understand what the APMP considers to be recognized best practices. I have looked taken the time to study those competencies which I have little, or less, experience of.	0% 50% 100% <input type="text"/>
d. Appendix A – Extracts from the Sample Objective Test Examination. I have looked at the Sample Scenario (which is different from the one that I will see in the exam) and believe that I understand the elements that are important. I understand the different types of questions and the rationale for recognizing the correct answers.	0% 50% 100% <input type="text"/>
e. Appendix B - APMP Industry Glossary of Terms (Version 6). I have looked at the glossary and am sure that I understand the meanings that the APMP gives to the terms that are listed there.	0% 50% 100% <input type="text"/>
f. I have passed the APMP Foundation Level Examination.	YES <input type="checkbox"/>
g. I have at least 3 years of experience in a bids & proposals environment.	YES <input type="checkbox"/>
h. I have found my APMP Membership Number. It is	
i. I have found my Candidate Number. It is APMP/	
j. In addition to the activities that the APMP suggests, for my own satisfaction, I plan to:	0% 50% 100% <input type="text"/>
k. I am committed to taking the time to ensure that I continue to educate myself as an APMP Practitioner and earn the appropriate number of CEUs in the specified period, once I have successfully passed the exam.	YES <input type="checkbox"/>

Section 1 – About objective test examinations

Objective test exams are different to multiple choice exams

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

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

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

Bloom's Taxonomy of Educational Objectives

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

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

Question styles used in the examination

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

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

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

Structure of the paper

The exam consists of three parts.

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

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

Section 2 – Preparing for the exam

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

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

Familiarize yourself with the APMP Body of Knowledge

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

Use the sample examination paper to test your knowledge

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

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

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

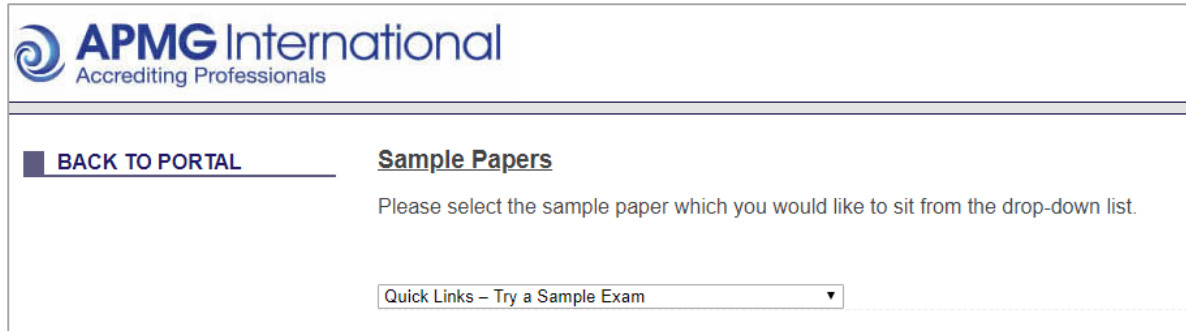
Feedback from the sample exam

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

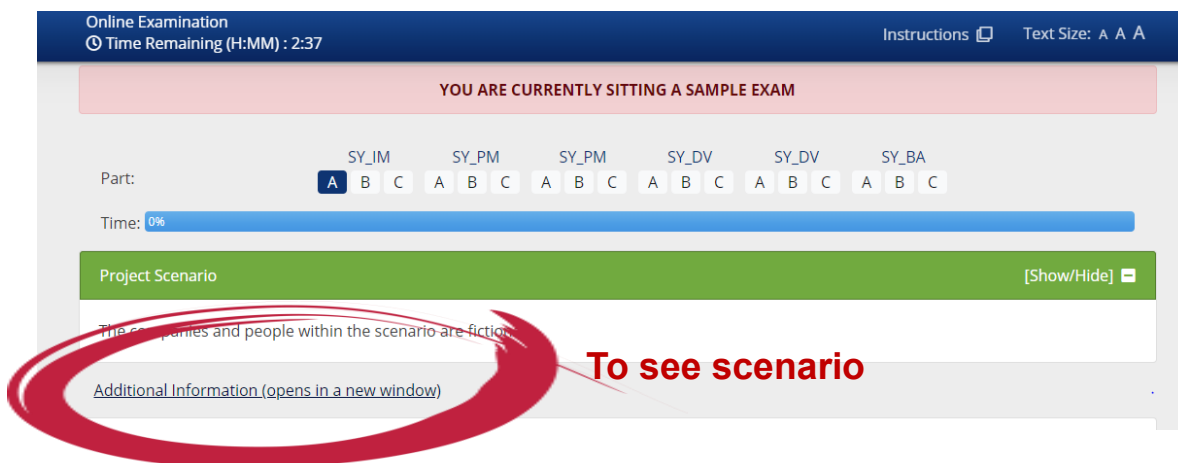
To access the sample exam, go to:

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

You should see this screen:



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



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

Section 3 - Registering for and taking the exam

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

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

The steps to registration

1. Before beginning you will need both your APMP membership number and foundation level Candidate ID.
2. Starting from the apmg-international.com website, select the 'Public Exams' option from the 'All APMG platforms' drop-down.
3. The exam you wish to take can be selected from the menu on the left-hand side of the page – in this case click APMP Practitioner (2015) to continue.
4. Once you are happy you have the correct exam click the 'Book new exam' button. The screen will confirm again which exam you have selected, and then give any Exam Language options within the drop down (English is the only language available at present). Click 'Add Online Exam to Basket':
5. The screen will show the title of the exam and the expiry date for taking it (by default this is one year from the date of booking). Click continue.
6. Please note that the name you use MUST be the same as the name associated with your membership number with APMP (i.e. if you have married/divorced/changed your name by deed poll since becoming a member you MUST either use the name APMP has for you, or request them to update your record with them before continuing).
7. You may use the 'Look up Your Details' option if you have sat other exams through APMG via the Public booking system. (If you have sat via the old system and have an APMP/ candidate ID the system will not be able to look you up.) Once the system has confirmed your membership you will be able to continue and enter your personal details.
8. The next section requires you to enter your Foundation candidate ID to confirm you have the pre-requisite qualification for this level and allows you to enter any special requirements you may have for the exam (i.e. second language or other special requirement). You will also need to complete the Self-study Declaration and the Data Protection Statement. At the bottom of the Confirmation and Data Protection statement you will find the Terms and Conditions box which MUST be checked. Once checked click 'Continue'.
9. The next page will give you the expiry date and cost of your examination, together with the option to use a voucher code to pay, for it if you have been given one, either by your ATO or APMP. If you do not have a voucher you will need to pay by card or using iDEAL.

10. Once you have either entered and sent a voucher, or completed the card details page, the booking confirmation page will appear:

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

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

FAQs relating to registration

Here are some common FAQs relating to the registration process:

What do I do to get started?

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

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

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

Can I change my exam time?

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

Taking the examination

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

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

The invigilator's or proctor's role

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

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

- If your admission to the examination is unauthorized
- If you create a disturbance or give or receive help
- If you attempt to remove examination materials or notes from the testing room
- If you attempt to take the examination for someone else

- If you have in your possession any prohibited item
- If you exhibit behavior consistent with memorization or copying of examination items

Ways in which the exam can be taken

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

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

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

Online examination under the control of a proctor

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

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

What is ProctorU?

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

What will be downloaded to my computer?

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

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

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

What do I do at the time of my exam?

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

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

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

- Webcam
- Microphone

- Required ports open (If you're in an office, ports might be blocked by your IT Dept.)
- Acceptable bandwidth
- Supported Adobe Flash
- Supported Operating System

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

What should I expect on the day of my exam?

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

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

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

The proctor will:

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

At what time should I arrive for my exam?

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

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

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

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

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

Online examination under the control of an invigilator

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

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

Who is acceptable as an invigilator?

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

At what time should I arrive for my exam?

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

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

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

Paper-based examination under the control of an invigilator

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

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

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

At what time should I arrive for my exam?

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

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

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

FAQs relating to the examination, all formats

Are breaks allowed during my exam?

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

What if I miss my exam slot?

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

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

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

Can I use a wireless connection?

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

Can I use multiple screens?

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

What information am I allowed to access during the exam?

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

Can I take notes during the exam?

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

Can I read the questions out loud?

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

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

Some information regarding the exam conditions is listed below:

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

General strategies for taking the exam

Sitting the exam

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

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

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

Read each question carefully

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

Take special note of phrasing, such as:

- Negative phrases (e.g. Choose the answer which DOESNT describe).
- Subjective questions (e.g. Choose the option that BEST describes).

- Judgement questions (e.g. Choose the MOST CORRECT answer).
- Multiple answers (e.g. Choose MORE than one).
- Read the question whilst covering the choices provided with your hand. Try to answer the question yourself THEN read through the choices. Doing this allows you to make a more accurate choice.

Accept the questions at face value

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

Do not change your original answer

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

If you get really stuck ...

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

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

Strategies for analysis of an exam question

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

When responding to each question, you should always select the option which is supported by the APMP BoK. You should also pay close attention the content of the scenario; to determine what the

question is truly asking, since the question may be asking what MUST be done or what is MOST commonly done vs. what can be done.

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

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

About the scenario and exam questions

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

Time management

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

Candidates who have English as a 1st language

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

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

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

Candidates requiring special consideration

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

Using the time during the exam

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

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

This suggested timing is for guidance only.

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

Access to other materials during the examination

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

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

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

Maintaining your certification level

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

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

Section 4 – Question types

Types of question

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

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

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

Using the Scenario, answer the following questions.	
Decide whether the approach taken is suitable and select the response that supports your decision.	
1	<p>The CSS Opportunity Manager has offered to maintain the Opportunity Plan so that the proposal writing team can continue to refer to this when developing the proposal content?</p> <p>Is this a suitable approach to the proposal development process?</p> <p>A No, because schedule review teams should use the Proposal Plan as a reference.</p> <p>B No, because the Proposal Plan is the only reference point required for reviewing.</p> <p>C Yes, because the Opportunity Plan should evolve to become the Proposal Plan and drive the proposal content.</p> <p>D Yes, because the Opportunity Plan removes the need for a Proposal Plan.</p>

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 deliberations, 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 Manager about the SOLACE opportunity landscape. 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.	A Account Manager.
2	Up-to-date schedule of bidding resources for the SOLACE Event Management opportunity.	B Opportunity Manager.
3	WT content and collateral.	C Proposal Manager.
		D Teaming Partner.

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

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

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

Using the Scenario, answer the following questions about managing the CSS proposal team.

Team members will be drawn from the CSS global network of offices, and WT.

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

- | | |
|---|--|
| 1 | <p>Which 2 special considerations will affect the way the CSS proposal team is managed?</p> <ul style="list-style-type: none">A A majority of team interactions will be through electronic means.B Many team members will have other organizational roles to fulfill.C There is potential for cultural clashes within the team.D Attendance at daily stand-up reviews will be mandatory for all members.E Team members’ work will have to be prioritized. |
|---|--|

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.

For example, in question 1 of the example provided, the assertion statement is true, and the Rationale is true. However, the rationale does not directly explain why the Proposal Manager should schedule the Final Document Review to take place before development is scheduled for completion. So, the answer is B.

Answer the following question about decision-making and delegation during the Document Readiness Review of the SOLACE Event Management proposal.

Lines 1 to 4 in the table below consist of an assertion statement and a reason statement. For each line identify the appropriate option, from options A to E, that applies. Each option can be used once, more than once or not at all.

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

	Assertion		Reason
1	The CSS Proposal Manager should schedule the Final Document Review to take place before development is scheduled for completion.	BECAUSE	The timing of Document Readiness Reviews should be at least two weeks before the submittal date on major proposals.
2	The CSS Proposal Manager should invite the same people who reviewed the Proposal Strategy to review the Final Document.	BECAUSE	Compliance reviews examine visuals and graphic elements, including action captions, for consistency and effectiveness.
3	It is NOT appropriate or justified that the CSS final decision to bid was based on the likelihood that SOLACE will continue to sponsor an annual SOLACE conference.	BECAUSE	The final decision to bid/not bid should be based entirely on the probability of the bidder winning.
4	The CSS Opportunity Manager should NOT delegate his responsibility, assuming the lead through to the final review.	BECAUSE	The opportunity team should ultimately maintain responsibility as the opportunity progresses.

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

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

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

Syllabus area	APMP BoK topic
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"> The customer The competition Capability, including resource Tool(s) to store information 	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

Syllabus area	APMP BoK topic
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
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
2. Planning and Management (PLM)	
Able to apply and adapt the APMP Planning and Management competencies to a given proposal/bid scenario.	
Develop a proposal schedule, including: <ul style="list-style-type: none"> • resourcing requirements • scheduling metrics • activities and reviews • customer’s timescales • cost estimate • risk • contingency 	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

Syllabus area	APMP BoK topic
Identify appropriate actions and responsibilities when managing risk management strategies for: <ol style="list-style-type: none"> 1. proposal development 2. solution 	Managing External Risk Managing Internal Risk
Identify appropriate content of progress reports <ul style="list-style-type: none"> • schedule changes • resource changes • issues requiring resolution • possible need to revisit qualification 	Scheduling Daily Team Management Stakeholder Engagement and Management
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	Scheduling Production Management Page and Document Design
Identify lessons learned	Lessons Learned Analysis and Management
Identify appropriate actions and responsibilities to support the key elements of the proposal development process	Scheduling End-to-End Process
Identify appropriate actions and responsibilities to manage a virtual proposal process team	Virtual Team Management
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:	
Whether a proposal schedule is appropriate, and has adapted to reflect internal and external changes	Scheduling
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

Syllabus area	APMP BoK topic
3. Development (DV)	
Able to apply and adapt the APMP Development competencies to a given proposal/bid scenario. To understand:	
The process to establish an early winning price target and a winning price strategy	Price to Win
Able to apply and adapt the APMP Development competencies to a given proposal/bid scenario.	
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"> • Bidder Comparison Matrix • SWOT 	Customer Analysis and Competitive Intelligence
Schedule and use analysis tools to identify and evaluate positive and negative discriminators to drive the development of proposal strategy statements	Strategy and Win Themes Customer Analysis and Competitive Intelligence Proposal Strategy Development
Identify the principles and key elements required to develop a customer-focused executive summary	Executive Summaries

Syllabus area	APMP BoK topic
Identify and develop the inputs required at a kick off meeting including: <ol style="list-style-type: none"> 1. Opportunity Summary 2. Customer Profile 3. Proposal Strategy 4. Proposal Operations 5. Proposal Schedule 6. Proposal Outline 7. Writers' Packages 8. Bid Request 9. Draft Executive Summary 10. Competitive Analysis 11. Roles and Responsibilities 12. Work Breakdown Structure (WBS)/WBS Dictionary 	Kick Off Meeting Management
Identify the appropriate level of content planning required	Content Plans
Identify customer requirements and build a compliance matrix	Compliance and Responsiveness Compliance Matrix
Apply the principles and appropriate techniques of persuasive writing for different types of audiences, including the: <ol style="list-style-type: none"> 1. Principles of writing clearly 2. Benefits of designing structured documents 	Persuasive Writing Writing Clearly Proposal Organization
Coordinate, organize and assign appropriate use of graphics, including: <ol style="list-style-type: none"> 1. Customer-focused action captions 2. Effectiveness of Illustration and action caption 3. Highlighting benefits and discriminators 4. Basic design principles 	Graphics and Action Captions Page and Document Design Features, Benefits and Discriminators Headings
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:	
Whether the bid decision process has been applied appropriately, using a consistent method/tool to qualify an opportunity	End-to-End Process Gate Decisions
Whether the value proposition presented to a customer is appropriate	Value Propositions

Syllabus area	APMP BoK topic
Whether the most appropriate teaming partner(s) have been selected by applying analysis tools: <ul style="list-style-type: none"> • Bidder Comparison Matrix • SWOT 	Customer Analysis and Competitive Intelligence
Whether a proposal strategy has been developed and assigned appropriately within the content plan	Win Strategy and Themes
Whether an Executive Summary is fit for purpose	Executive Summaries
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	Content Plans Proposal Theme Statements Win Strategy and Themes
Whether a compliance matrix is fit for purpose and has been used appropriately	Gate Decisions Compliance and responsiveness
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"> 1. Customer-focused action captions 2. Effectiveness of Illustration and action caption 3. Highlighting benefits and discriminators 4. Basic design principles 	Graphics and Action Captions Page and Document Design Features, Benefits and Discriminators Headings
4. Behavior and Attitude (BA)	
Able to apply and adapt the APMP Behavior and Attitude competencies to a given proposal/bid scenario. Specifically, to:	
Identify appropriate interpersonal styles and communication methods/media: <ul style="list-style-type: none"> • interpretation of messages and responses • factors that affect the effectiveness of communication and potential barriers • understand and interpret situational needs and desired outcomes • appropriate ways to interact with prospective customers in manner that builds effective relationships 	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

Syllabus area	APMP BoK topic
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
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:	
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

Appendix A - Scenario and some questions from the Sample OTE

Sample Scenario

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

- The cover page
- The scenario description
- Information about the bidding organizations
- Additional information for the use of candidates in individual questions (in this case questions 5A and 5C)

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



The Practitioner Examination

Scenario Booklet

This is a 2.5-hour objective test examination.

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

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

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

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

Questions one and six are worth 12 examination points each.

Questions two and three are worth 28 examination points combined.

Questions four and five are worth 28 examination points combined.

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

The examination is to be taken with the support of the *APMP Body of Knowledge*. Candidates may choose to have a printed copy of *The Practitioner Study Guide*, which contains an integrated Glossary of Terms. No material other than the Question Booklet, the Scenario Booklet, the Answer Booklet, the *APMP Body of Knowledge* and the *Practitioner Study Guide* if chosen, is to be used.

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

Candidate Number:

Society of Leadership and Chief Executives (SOLACE) Scenario Summary

The Society of Leadership and Chief Executives (SOLACE) is an international, independent society that supports, represents and sets standards for business leaders and chief executives worldwide.

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

Event Management Services Opportunity

Background to the Competition and Request For Proposal (RFP) Phase

SOLACE is seeking a partner to organize and support the existing annual international conference in the USA. The Society intends to introduce a second annual event within the next twelve months. To encourage and accommodate its rapidly growing worldwide membership, the second conference must be held on a different continent.

The partner chosen will be responsible for supporting both events as a managed service, including researching and identifying the best location each year for the second event. The conferences must be accessible to the whole membership, therefore location will be key.

SOLACE is considering outsourcing its event management so that it can:

- grow worldwide membership
- generate increasing revenue from the events
- continue to be seen as the worldwide authority for best practices in business leadership.

SOLACE must be able to demonstrate to its membership that the Event Management Service provides:

- value for money for the organization and attendees
- simplicity of service for the delegates, exhibitors and speakers
- 99% + customer satisfaction from all categories of attendees
- scalability to meet Chapter and international conference needs.

Society of Leadership and Chief Executives (SOLACE) Scenario Summary

Currently, SOLACE is unable to organize more than one conference a year; the main board believe it is likely to retain better control and achieve higher returns by employing more staff and keeping the conference services in-house.

Following internal bid/no-bid decisions, each company believes that its bid stands a good chance of winning.

The SOLACE Vision and Requirements

The SOLACE vision is to have the infrastructure and ability, within the next five years, to hold multiple annual conferences around the world, each attracting up to 15,000 attendees. Currently, the conferences are arranged by a part-time, in-house team of three, all of whom have other roles within the society.

They also wish to be able to offer event management services to Chapters to encourage Corporate Membership. Individual Chapter events currently attract between 100 and 1200 attendees.

The successful bidder must provide:

- end-to-end travel services for attendees, including flights, accommodation, visa services
- conference venue selection and complete event management services for attendees, exhibitors and speakers
- high-quality networking events during the conference.

The Three Bidders

- Conference Support Solutions (CSS)
- Worldwide Travel (WT)
- Association Conference Services (ACS)

All of these companies have been talking to SOLACE for some time. Each has different reasons for being attracted to the opportunity.

Conference Support Solutions (CSS)

Background

CSS is a full-service management company which has specialized in the complete management of conferences for 30 years. They have organized conferences across six continents and in over 45 countries, and have a network of offices to support this global reach. They are experienced in small, medium and large conference management. They are not known for providing conference attendees with travel management services. However, their aim is to increase their market share by providing this as part of their solution.

Overall Strategy and Solution

The SOLACE opportunity is of high strategic importance to the CSS Executive Leadership in launching into the travel management service provision. CSS understands that in order to secure this contract they must win over the SOLACE main board, with which they have had problematic meetings as it is in favor of keeping all conference management in-house.

CSS existing conference management service includes:

- venue sourcing and contract management
- all aspects of venue preparation and management for the event
- event sponsorship and exhibitor promotion and management
- event mobile and smart device apps.

Teaming

CSS understands that, to be credible, it will need to partner with an organization that specializes in travel management and believes that it will be able to beat its main competitor by partnering with Worldwide Travel (WT).

CSS has identified the risk that WT may submit an independent competitive bid as well since WT have insisted on a clause allowing this in the teaming agreement.

CSS has been talking to SOLACE for the last two years and has been received favorably by the Executive Director.

CSS assigned a Bid Manager early to the SOLACE opportunity. The Bid Manager must also carry out the role of Proposal Manager.

Worldwide Travel (WT)

WT is known, and has excellent relationships with the SOLACE Executive and Non-Executive Boards

WT believes that, with increased volume travel bookings, it can achieve up to 20% further savings for SOLACE delegates. This has already been achieved for the Association of Welders.

Background

Worldwide Travel is seeking to broaden its capability and the SOLACE Event Management Services is seen as a major opportunity to become known in the market for providing large events with a complete travel management service. WT uses its experience to provide customers with the services and knowledge required to travel and stay in all parts of the world. Its travel management service has a reputation for being low-cost, effective and easy to access and use.

SOLACE has called on WT periodically for the last ten years to provide travel management services for one-off trips for board members and staff to various Chapter conferences around the world.

The WT board sees this as an opportunity to evolve its existing small event management capability into something much larger. WT is currently under pressure to grow and expand faster by offering additional services or risk losing its existing market position.

Overall Strategy and Solution

WT has decided to offer its low-cost travel management services to SOLACE, with the idea of encouraging SOLACE to keep the event management in-house. WT hopes this approach will allow it to build its reputation in event management by working with the local SOLACE Chapters to arrange the smaller conferences first. Once the contract is awarded, WT will be the incumbent and will be able to help SOLACE at all conferences.

Teaming

In order to ensure it wins the travel management business, WT has agreed to partner with CSS, leveraging its ability to provide:

- low-cost air fares with price matching
- low-cost, high-quality accommodation
- Online check-in and boarding passes
- 24/7 dedicated account manager
- VIP services for travelers
- mobile app to provide updates for travelers on the move
- optimization of traveler savings.

WT has insisted that it reserves the right to bid independently of CSS and will use its well-thought-out, in-house strategy to position itself to win.

Association Conference Services (ACS)

ACS has a reputation in the market for being very expensive.

ACS has been building a relationship and discussing requirements with the Executive and Non-Executive Board of SOLACE for the last six months and they have had a polite reception.

Background

ACS has leading edge, end-to-end event management solutions. It provides its customers with the services, experience and knowledge to run large events on time and provide all attendees with a good experience. To ACS, SOLACE is core business, albeit SOLACE has some unusual features such as the need to provide much smaller events for the geographically distributed Chapters. ACS is not convinced that these can currently be delivered in a cost-effective manner.

Overall Strategy and Solution

ACS sees this as an opportunity to develop the proposed two annual conferences into an annual conference on each continent and do away with the smaller Chapter conferences. Its aim is to demonstrate to SOLACE that, by holding a smaller number of much larger events, the returns to both SOLACE and the Chapters will be greater. SOLACE is not aware of this and would be offended if it knew, as SOLACE believes that the annual local Chapter events are integral to retaining and growing membership.

ACS can offer the complete travel and conference services required and will not need to team. The ACS solution will offer:

- project management of each event
- venue analysis, site inspection and contracting
- social media publicity management
- online delegate and registration management
- an integrated, simple accommodation booking and registration process
- travel and visa assistance, airport meet and greet, airport transfers
- regular communication across several platforms, email, SMS, mobile app.

Question 5: Development - Additional Information

Question 5A Additional Information

Bidder Comparison Matrix completed by CSS

Bidder Comparison Matrix					
Solace Hot Buttons	Weighting	CSS	WT	ACS	Discriminator
Grow worldwide membership	20	10	5	18	ACS global experience is seen as the benchmark
Generate increasing revenue from the events	30	25	5	20	ACS has a reputation for successful, large, high-quality events and is therefore likely to be able to continually increase revenue
Continue to be seen as the worldwide authority for best practices in business leadership	10	5	5	5	No known difference at present; will depend on quality of speakers and agendas
Demonstrate Value for Money across all aspects of the event for attendees	30	15	25	15	ACS is known as costly but has a reputation for very good events. CSS can only demonstrate value for money for event management. WT has demonstrated Value for Money for travel management already with SOLACE
Scalability to meet Chapter and international conference needs	10	2	2	2	ACS only delivers large event managed service solutions. CSS can extend only event management services to Chapters. WT can only provide travel services to Chapters
Total Score	100	57	42	60	

Question 5C: Additional Information

The CSS Bid Manager has not yet begun writing content for the proposal but the graphics team has been busy creating images and action captions.

They have created a number of images for inclusion in the proposal, two examples of which are shown below.

Example 1



Figure 3. Elevate the SOLACE conference attendee experience before, during and post event with the CSS mobile and smart app. Using the online, mobile and smart device app, event attendees will be kept up to date with travel, hotel bookings, VIP meet and greet, and speaker events and where they are taking place.

Example 2



Figure 4. Push Notifications. Notify attendees immediately about room changes or any other important messages with push notifications. Drive session attendance with a searchable list of your speakers and sessions complete with detailed profiles and session descriptions. Income can be generated from notifications by selling pushes to sponsors.

Sample questions

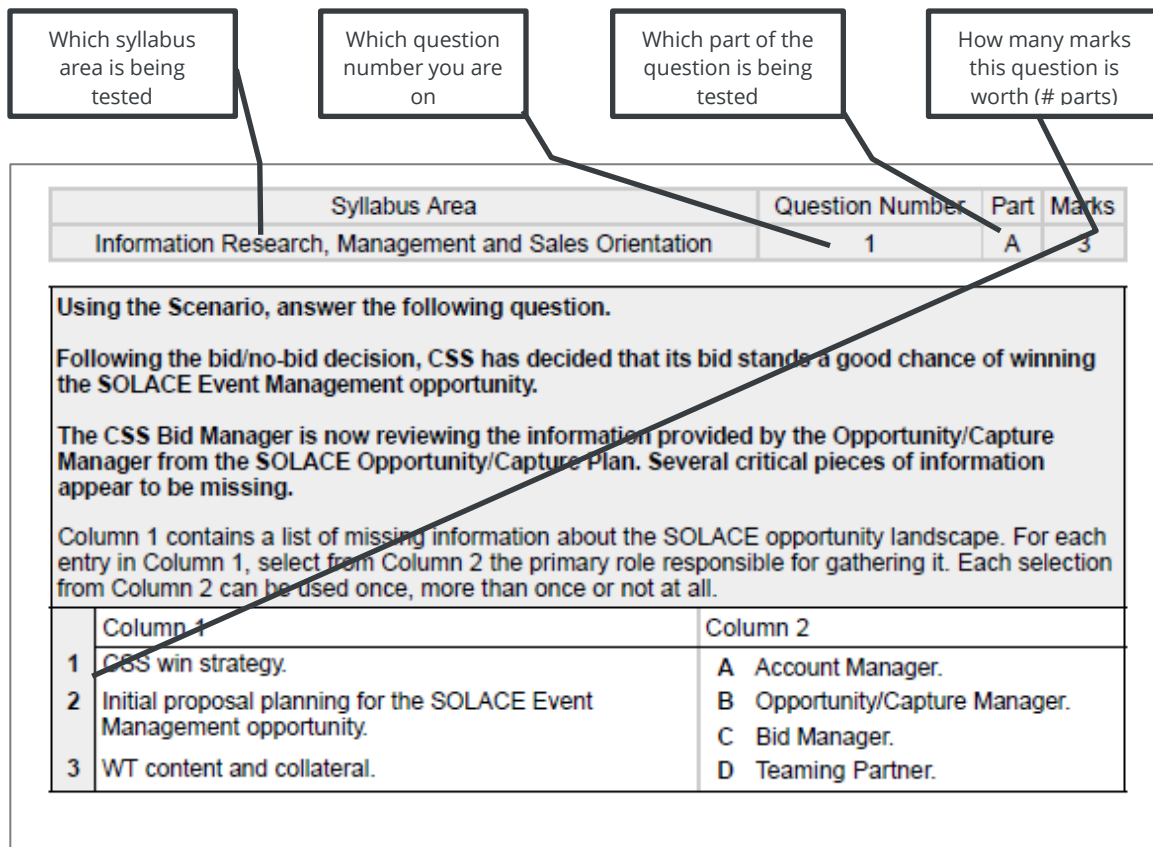
The following pages show actual questions from the sample examination paper. This guide contains **21** of the actual questions from the sample examination paper. This part of the guide includes:

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

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

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

At the top of each question, you have information that tells you:



Syllabus Area	Question Number	Part	Marks
Information Research, Management and Sales Orientation	1	A	3

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.	A Account Manager.
2 Initial proposal planning for the SOLACE Event Management opportunity.	B Opportunity/Capture Manager.
3 WT content and collateral.	C Bid Manager.
	D Teaming Partner.

In the rationale table you have:

The correct answers

A description of the rationale as to why that answer is correct

The title of the relevant section of the APMP BoK

Question: 1, Syllabus: IM, Part: A, Type: MG, SyllabusRef: IM0301, Level: 3		
1	Correct [B]:	Opportunity/Capture Manager. The role of the opportunity manager is to lead individual, or specific, opportunities from qualification (i.e., pursuit decision) to contract award. Responsible for integrating market, customer, and competitor intelligence with internal management and financial concerns. Oversees opportunity-specific customer influence, win strategy development and implementation; manages internal and external stakeholder engagement; develops offering and winning price, and risk management strategy. Identifies and negotiates teaming partners and arrangements when necessary. Additionally, leads early strategy development, co-ordinates with stakeholders to assign pursuit team members, plans and manages the pursuit budget, facilitates teaming decisions, and co-ordinates review and approval requirements for offering, cost/profit, and proposal deliverables. Assures customer positioning, offering alignment with customer needs, and winning price. Ref: Lead Your Team / Individual and Organizational Roles
2	Correct [C]:	The role of the Bid Manager is to lead the overall proposal development, beginning at bid-decision and through post-submission requirements. Responsible for overseeing the integration of the offering and proposal planning; transitioning to proposal development; organizing review and approval of the proposal offering and content; ensuring timely proposal delivery, and follow-up with customer and internal stakeholders. Additionally, is able to lead a multi-disciplinary team to implement the opportunity strategy for offering details needed to prepare the proposal, including technical, management, contract, cost estimate and other customer deliverables. Assures the offer is compliant and responsive (technical, management, and cost); manages appropriate support from stakeholder organizations, and their timely involvement and decision-making. Ref: Lead Your Team / Individual and Organizational Roles
3	Correct [D]:	Each teaming partner is responsible for collating and collecting specific content; the Lead Bid Manager should provide support by thoroughly explaining the context and the content required against the customer's requirements. Ref: Focus on the Customer / Teaming

Questions

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

Question Number 1
Syllabus Area Information Research, Management and Sales Orientation

Syllabus Area	Question Number	Part	Marks
Information Research, Management and Sales Orientation	1	A	3

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.	A Account Manager.
2	Initial proposal planning for the SOLACE Event Management opportunity.	B Opportunity/Capture Manager.
3	WT content and collateral.	C Bid Manager.
		D Teaming Partner.

1	Correct [B]:	<p>Opportunity/Capture Manager. The role of the opportunity manager is to lead individual, or specific, opportunities from qualification (i.e., pursuit decision) to contract award. Responsible for integrating market, customer, and competitor intelligence with internal management and financial concerns. Oversees opportunity-specific customer influence, win strategy development and implementation;; manages internal and external stakeholder engagement;; develops offering and winning price, and risk management strategy. Identifies and negotiates teaming partners and arrangements when necessary. Additionally, leads early strategy development, co-ordinates with stakeholders to assign pursuit team members, plans and manages the pursuit budget, facilitates teaming decisions, and co-ordinates review and approval requirements for offering, cost/price, and proposal deliverables. Assures customer positioning, offering alignment with customer needs, and winning price. Lead Your Team / Individual and Organizational Roles</p>
2	Correct [C]:	<p>The role of the Bid Manager is to lead the overall proposal development, beginning at bid-decision and through post-submission requirements. Responsible for overseeing the integration of the offering and proposal planning; transitioning to proposal development; organizing review and approval of the proposal offering and content; ensuring timely proposal delivery, and follow-up with customer and internal stakeholders. Additionally, is able to lead a multi-disciplinary team to implement the opportunity strategy for offering details needed to prepare the proposal, including technical, management;; contract;; cost estimate and other customer deliverables. Assures the offer is compliant and responsive (technical, management, and cost); manages appropriate support from stakeholder organizations, and their timely involvement and decision-making. Ref: Lead Your Team / Individual and Organizational Roles</p>
3	Correct [D]:	<p>Each teaming partner is responsible for collating and collecting specific content; the Lead Bid Manager should provide support by thoroughly explaining the context and the content required against the customer's requirements. Ref: Focus on the Customer / Teaming</p>

Syllabus Area	Question Number	Part	Marks
Information Research, Management and Sales Orientation	1	C	5

Using the Scenario, answer the following question about the application of the opportunity management process for the SOLACE Event Management Services opportunity.

Lines 1 to 5 in the table below consist of an assertion statement and a reason statement. For each line identify the appropriate option, from options A to E, that applies. Each option can be used once, more than once or not at all.

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

	Assertion		Reason
1	The CSS Bid Manager should be tasked with comparing the company's strengths and weaknesses with that of ACS.	BECAUSE	An Opportunity/Capture Plan should include an insight into the price each competitor is likely to bid.
2	CSS should interpret the high price reputation of ACS as an opportunity.	BECAUSE	Competitor weaknesses should be viewed as opportunities.
3	CSS should ask WT to share its opinion of ACS service delivery capabilities.	BECAUSE	Teammates should be involved in competitor reviews.
4	WT should decide to partner with CSS without a bid/no-bid decision.	BECAUSE	The number of decision gates will depend upon the complexity of the opportunity.
5	The CSS Opportunity/Capture Manager should instruct the Bid Manager to develop the win strategy.	BECAUSE	Proposal strategies inform win strategies.

1	False:	The Opportunity Manager should have completed this comparison in the Opportunity Plan, an external analysis (detailed description of the opportunity and its requirements, a customer analysis and a competitor analysis.) Ref: Use Tools and Systems / Opportunity Plans The reason supports the assertion - The answer is therefore D.	True:	It is not enough to know what requirements a customer may include in an RFP. It is not enough to know which competitors are planning to bid. You must also gain insight into what they will offer, at what price, and most importantly, what the customer thinks of them. Ref: Use Tools and Systems / Opportunity Plans The reason supports the assertion - The answer is therefore D.
2	True:	Seen as a weakness of ACS, this presents an opportunity to CSS. Any strength should be considered as a threat. Ref: Use Tools and Systems / Opportunity Plan The reason supports the assertion - The answer is therefore A.	True:	Competitor weaknesses are viewed as opportunities. Strengths are considered threats. Ref: Use Tools and Systems / Opportunity Plan
3	True:	For maximum effectiveness, teammates should be involved in strategy development, competitor reviews, kick off meetings, and other important activities. Ref: Use Tools and Systems / Opportunity Plans The reason supports the assertion. The answer is therefore A.	True:	A benefit of teaming is the ability to keep discriminating capabilities from your competition. You can improve your competitive positioning by cementing good partnerships early. Ref: Use Tools and Systems / Opportunity Plans
4	False:	The number and focus of decision gates depend upon the complexity of the opportunities and company governance processes, but will always include at least a bid/no-bid decision. Ref: Use Tools and Systems / Opportunity Plans The reason supports the assertion - The answer is therefore D.	True:	The number and focus of decision gates depend upon the complexity of the opportunities and company governance processes, but will always include at least a bid/no-bid decision. Ref: Use Tools and Systems / Opportunity Plans
5	False:	The Opportunity/Capture Manager should develop the win strategy in the Opportunity Plan. Win strategies from the Opportunity Plan inform proposal strategies, which can serve as the anticipated structure of the solicitation. Ref: Use Tools and Systems / Opportunity Plans The reason supports the assertion - The answer is therefore E.	False:	Information on the customer, requirements, and competition transfers directly into the proposal plan. Win strategies from the Opportunity Plan inform proposal strategies, which can serve as the anticipated structure of the solicitation. Ref: Use Tools and Systems / Opportunity Plans The reason supports the assertion - The answer is therefore E.

Syllabus Area	Question Number	Part	Marks
Planning and Management	3	A	5
<p>Using the Scenario and the additional information provided below, answer the following questions about the CSS proposal strategy that has been developed</p> <p>Proposal Strategy Statements:</p> <ol style="list-style-type: none"> We will emphasize our strength in ability to extend services to Chapters. We will mitigate our weakness in demonstrating value for money across all aspects of the event for the attendees. We will highlight our competitors' weaknesses in generating increasing revenue from the events. We will downplay our competitors' strengths in delivering high-value events. <p>Decide whether the approach taken is suitable, and select the response that supports your decision.</p>			
1	<p>CSS has identified case studies of scaled events from previous Management Conferences it has organized over the last five years to be included in the content plan and reviewed. One of the case studies highlights a customer event with 1,500 attendees, and another highlights a customer event with over 10,000 attendees.</p> <p>Are these case studies suitable to support strategy Statement 1 above?</p> <p>A No, because authors, as subject matter experts, should be allowed to write their allocated sections of the content plan.</p> <p>B No, because the case studies do not relate to SOLACE.</p> <p>C Yes, because the case studies will provide a template for writers.</p> <p>D Yes, because providing event management services for the Chapter conferences is a priority for the SOLACE Executive Board.</p>		
2	<p>The topical outline for the content plan, which contains the above Proposal Strategy Statements, will be distributed to contributors with instructions to refer to the RFP and add any other requirements they may identify.</p> <p>Is this a suitable approach to the content plan review?</p> <p>A No, because the content plan should NOT contain the Proposal Strategy Statements.</p> <p>B No, because contributors should be given further guidance to avoid requirements being overlooked or duplicated.</p> <p>C Yes, because too much planning constrains the authors.</p> <p>D Yes, because contributors should not require further guidance on strengths and weaknesses.</p>		
<p>Question continues on next page</p>			

Question continued

3	<p>The content plan shows where a graphic is to be included to demonstrate the cost savings that WT has achieved already for SOLACE when its travel management service has been used.</p> <p>Is this a suitable entry to support strategy statement 2 above?</p>
A	No, because WT should be asked to provide a graphic highlighting the potential volume cost saving of a combined service with CSS.
B	No, because reviewers should highlight the most effective positioning of graphics.
C	Yes, because CSS intends to provide travel management services using WT collateral.
D	Yes, because this highlights WT's strengths.
4	<p>The Bid Manager believes that the proposal strategy to 'ghost' the 'independent competitive bid' expected to be submitted by WT has not been developed. The Bid Manager intends to hold an additional proposal strategy development meeting with key members of the CSS team.</p> <p>Is this a suitable approach to manage this?</p>
A	No, because WT is a partner and CSS should share all but pricing information.
B	No, because SOLACE is seeking a complete event management service and therefore a solution that only provides travel management is highly unlikely to be successful.
C	Yes, because CSS should demonstrate the challenges SOLACE will have if it awards the contract to an organization providing only part of the solution.
D	Yes, because CSS believes it can win this opportunity on its own.
5	<p>A recent Industry Analyst white paper compares event management approaches. It reviews the sole provider, high cost, high -quality approach versus the partnering approach, ensuring lower cost event management with excellent feedback. The article rationalizes why it is more difficult for the sole provider of high cost, high quality events to increase revenue generation for the customer of recurring events/conferences as the price is prohibitive for attendees.</p> <p>A graphic has been designed showing the average revenue generated from both approaches to support proposal strategy statement 3 above.</p> <p>Is this the MOST suitable use of this graphic in the content plan?</p>
A	No, because this evidence is not specific to CSS.
B	No, because this provides independent evidence to support a competitors' strengths.
C	Yes, because such evidence should be used in as many places as possible.
D	Yes, because this provides independent evidence to support a competitors' weakness.

1	A	Incorrect:	Effective Proposal strategy statements identify clear and compelling evidence that can be placed in the proposal and incorporates both strategic and tactical aspects. The strategic portion establishes your position. The tactical portion defines 'how you will implement' the strategy, the action. Think of the strategic part as 'what you will do', and the tactical part as 'how you will do it'. Ref. Focus on the Customer / Win Strategy and Theme Statements
	B	Incorrect:	Proposal strategy can be implemented in four fundamental ways and proposal strategy statements should form part of the proposal outline and/or content plan developed for the response document: emphasize your strengths, mitigate your weaknesses, highlight your competitors' weaknesses, downplay your competitors' strengths. Ref: Focus on the Customer / Win Strategy and Theme Statements
	C	Incorrect:	Proposal strategy statement(s) are developed from the Opportunity Plan to emphasize strengths, mitigate weaknesses, downplay competitor strengths, and highlight competitor weaknesses. Each statement should contain supporting evidence and be placed in the content plan to help guide writers and to ensure consistency of the proposal strategy throughout the document. Ref. Use Tools and Systems / Content Plan
	D	Correct:	Scenario identifies 'providing event management services for the Chapter conferences as a priority for the SOLACE Executive Board' as a customer hot button or issue. Proposal Strategy is a plan of what to include in your written responses to create a persuasive, winning proposal. Proposal strategy is a subset of win strategy and describes and confirms the successful tactics and actions that have been carried out in the pre-engagement phase. Ref. Focus on the Customer / Strategy and Win Themes
2	A	Incorrect:	Proposal strategy statement(s) should contain supporting evidence and be placed in the content plan to help guide writers and to ensure consistency of the proposal strategy throughout the document. Ref. Use Tools and Systems / Content Plan
	B	Correct:	A distinctly bad practice is to distribute the top-level outline to contributors with instructions to refer to the RFP and add any other requirements they may identify. This will lead to orphan requirements and duplications. Ref. Use Tools and Systems / Content Plan
	C	Incorrect:	See rationale B
	D	Incorrect:	See rationale B
3	A	Correct:	Proposal strategy statement(s) should contain supporting evidence and be placed in the content plan to help guide writers and to ensure consistency of the proposal strategy throughout the document. CSS intends to mitigate its weakness by partnering with WT to provide travel management services using WT collateral. Ref. Use Tools and Systems / Content Plan
	B	Incorrect:	Reviewers may suggest improvements to the content plan. Ref. Use Tools and Systems / Content Plan
	C	Incorrect:	The proposed graphic would support WT as a competitor. The evidence should support the partnering proposal. Ref. Use Tools and Systems / Content Plan
	D	Incorrect:	The proposed graphic would support WT as a competitor. The evidence should support the partnering proposal. Ref. Use Tools and Systems / Content Plan

4	A	Incorrect:	Consideration should be given as to how to develop strategy when teaming with an organization that may be providing content to multiple bidders as is typical with some sub-contractors; or indeed with a partner who may decide to bid on their own. Both cases should be treated as an additional competitor in order that your organization can build strategy that both supports the teaming decision made, and 'ghosts' the organization in all other circumstances. Ref. Focus on the Customer / Strategy and Themes
	B	Incorrect:	Be adaptive and creative when thinking about developing proposal strategy, remember it's all about evidencing a logical and justifiable argument as to why the customer should buy from you. Proposal strategy development should consider 'Do nothing', 'Take in-house', and 'Award only part of the expected contract'. Ref. Focus on the Customer / Strategy and Themes
	C	Correct:	Be adaptive and creative when thinking about developing proposal strategy, remember it's all about evidencing a logical and justifiable argument as to why the customer should buy from you. A focused strategy development based on the award of only part of the expected contract will remind us to develop strategy to provide evidence to the customer that awarding only part of the contract may cost less but is unlikely to deliver all the outcomes required against their hot buttons. Ref. Focus on the Customer / S
	D	Incorrect:	Consideration should be given as to how to develop strategy when teaming with an organization that may be providing content to multiple bidders as is typical with some sub contractors; or indeed with a partner who may decide to bid on their own. Both cases should be treated as an additional competitor in order that your organization can build strategy that both supports the teaming decision made, and 'ghosts' the organization in all other circumstances. Ref. Focus on the Customer / Strategy and Themes
5	A	Incorrect:	Use the remaining time to actually perform competitive studies and collect independent evidence of your findings. Externally validated evidence removes subjectivity and is very convincing in customer documents. The ethical guideline is that competitors are not named, however this guideline is overcome when the evidence included in the proposal is independent. Ref. Focus on the Customer / Strategy and Themes
	B	Incorrect:	Externally validated evidence removes subjectivity and is very convincing in customer documents. The ethical guideline is that competitors are not named, however this guideline is overcome when the evidence included in the proposal is independent. Ref. Focus on the Customer / Strategy and Themes

Syllabus Area	Question Number	Part	Marks
Development	4	C	3

Answer the following questions about theme statements.

The CSS Bid Manager has developed a number of theme statements to focus the Evaluator on CSS discriminators and other features that will satisfy SOLACE needs. These statements have been assessed for their impact and suggestions made to improve them accordingly.

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

1	<p>Theme Statement 1: Conference attendance will grow over the next 5 years, using CSS conference management services, as has been achieved by the Association of Welders during the last five years.</p> <p>Which 2 actions correctly describe improvements to this statement?</p> <p>A Delete 'over the next 5 years', because theme statements should not be time-limited.</p> <p>B Move 'Using CSS conference management service' to the beginning, because focus should be on the supplier.</p> <p>C Change to 'grow attendance from 1,500 to 10,000 over the next 5 years', because benefits should be quantified wherever possible.</p> <p>D Change to begin 'SOLACE will be able to grow conference attendance figures', because a theme statement should link directly to a customer issue.</p> <p>E Remove reference to 'Association of Welders', because other customers should not be mentioned.</p>
2	<p>Theme Statement 2: CSS has organized conferences across six continents and in over 45 countries, supported by our global network of offices.</p> <p>Which 2 actions correctly describe improvements to this statement?</p> <p>A Amend to read, 'SOLACE will be supported by our global office network when hosting new and existing conferences, because benefits should be placed before features.</p> <p>B Remove 'network of', because these are unnecessary words.</p> <p>C Amend to read, 'The CSS global network of offices has organized conferences across six continents and in over 45 countries', because this is a key discriminator..</p> <p>D Remove 'CSS has organized conferences across six continents', because these were not organized for SOLACE.</p> <p>E Remove 'global', because this does NOT align to a customer issue.</p>
3	<p>Theme Statement 3: SOLACE will be provided with a low-cost, effective and easy to access end-to-end travel management service.</p> <p>Which 2 actions correctly describe improvements to this statement?</p> <p>A Remove this theme statement, because this does not address a customer requirement.</p> <p>B Replace 'be provided with a low-cost,' with 'reduce costs by up to 20%, through an...', because benefits should be quantified wherever possible.</p> <p>C Insert 'as has been achieved through volume bookings for the Association of Welders during the last 5 years' at the end of the sentence, because a theme statement should provide proof of a claim.</p> <p>D Insert more detail around access arrangements, because all features should be fully explained.</p> <p>E Begin with 'Partnering with CSS, WT will provide SOLACE with a low-cost....', because the supplier name should appear in every theme statement.</p>

1	A	Incorrect:	Evaluators will not believe your proposal themes unless you use sufficient, quantifiable, and verifiable proof (differentiators and substantiating metrics) to persuade them. Statements should quantify benefits wherever possible. Ref. Focus on the Customer / Proposal Theme Statements
	B	Incorrect:	Placing benefits before features, tying them to customer issues, and naming the customer first and more often than you name yourself will sustain the attention of evaluators and communicate a reduced sense of risk. Ref. Focus on the Customer / Proposal Theme Statements
	C	Correct:	The best theme statements tie benefits to features and address customer issues. Evaluators will not believe your proposal themes unless you use sufficient, quantifiable, and verifiable proof (differentiators and substantiating metrics) to persuade them. Statements should quantify benefits wherever possible. Ref. Focus on the Customer / Proposal Theme Statements
	D	Correct:	Placing benefits before features, tying them to customer issues, and naming the customer first and more often than you name yourself will sustain the attention of evaluators and communicate a reduced sense of risk. Ref. Focus on the Customer / Proposal Theme Statements
	E	Incorrect:	Evaluators will not believe your proposal themes unless you use sufficient, quantifiable, and verifiable proof (differentiators and substantiating metrics) to persuade them. Statements should quantify benefits wherever possible. Ref. Focus on the Customer / Proposal Theme Statements
2	A	Correct:	Placing benefits before features, tying them to customer issues, and naming the customer first and more often than you name yourself will sustain the attention of evaluators and communicate a reduced sense of risk. Ref. Focus on the Customer / Proposal Theme Statements)
	B	Correct:	For theme statements to be effective, you must clearly and tangibly show customers how they will benefit. Try cutting out unnecessary words and using simple, jargon-free language and short, declarative sentences. (Ref: Focus on the Customer / Proposal Theme Statements
	C	Incorrect:	Placing benefits before features, tying them to customer issues, and naming the customer first and more often than you name yourself will sustain the attention of evaluators and communicate a reduced sense of risk. Ref. Focus on the Customer / Proposal Theme Statements
	D	Incorrect:	Evaluators will not believe your proposal themes unless you use sufficient, quantifiable, and verifiable proof (differentiators and substantiating metrics) to persuade them. Statements should quantify benefits wherever possible. Ref. Focus on the Customer / Proposal Theme Statements
	E	Incorrect:	Placing benefits before features, tying them to customer issues, and naming the customer first and more often than you name yourself will sustain the attention of evaluators and communicate a reduced sense of risk. Ref. Focus on the Customer / Proposal Theme Statements
3	A	Incorrect:	The best theme statements tie benefits to features and address customer issues. SOLACE require an end-to-end travel service for attendees. (Ref: Focus on the Customer / Proposal Theme Statements
	B	Correct:	Evaluators will not believe your proposal themes unless you use sufficient, quantifiable, and verifiable proof (differentiators and substantiating metrics) to persuade them. Statements should quantify benefits wherever possible. Ref. Focus on the Customer / Proposal Theme Statements

C	Correct:	Evaluators will not believe your proposal themes unless you use sufficient, quantifiable, and verifiable proof (differentiators and substantiating metrics) to persuade them. Statements should quantify benefits wherever possible. Ref. Focus on the Customer / Proposal Theme Statements
D	Incorrect:	For theme statements to be effective, you must clearly and tangibly show customers how they will benefit. Try cutting out unnecessary words and using simple, jargon-free language and short, declarative sentences. Ref. Focus on the Customer / Proposal Theme Statements
E	Incorrect:	Placing benefits before features, tying them to customer issues, and naming the customer first and more often than you name yourself will sustain the attention of evaluators and communicate a reduced sense of risk. Ref. Focus on the Customer / Proposal Theme Statements

Appendix B - APMP Industry Glossary of Terms (Version 6)

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

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

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

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

Term	Equivalent or Corresponding Terms	Definition and Additional Information
Boilerplate	Customizable Reusable Content, Knowledge Repository, Knowledge Resources	Stored text and graphics that are available for potential reuse in future proposals. Boilerplate is information that is harvested from existing documentation to be repurposed in other proposals. It may include text and graphics, technical specifications, company procedures, and advertising and marketing materials, such as generic descriptions of the company or organization. You may want to use boilerplate to build a tailored description customized for the project and client.
Business Case	Opportunity Financial Analysis, Prospectus for Offer, Pro Forma Analysis	An internal documented argument for bidding on a particular opportunity. The business case typically focuses on the financial aspects of the bid. The same term may also be applied to a document or proposal section that is aimed at providing the customer with the financial justification for making the purchase.
Business Case Review/Senior Management Review	Gold Team Review, Final Bid Review, Business Case Review	All the internal milestones and approvals (internal governance) required to sign off on the solution, pricing, and legal requirements.
Business Development Capability Maturity Model (BD-CMM)		<p>A research-based framework that guides business development organizations in identifying and implementing high-priority improvement actions. The model encompasses the entire business development life cycle. It establishes a structure that guides increased performance to:</p> <ul style="list-style-type: none"> • Increase value to the customer • Build management visibility and leadership • Expand the competency of individuals and teams • Improve processes and accountability • Enhance systems and infrastructure
Business Development Maturity Level	Business Development Capability Maturity Model (BD-CMM) Level	<p>An indicator of an organization's adoption of business development best practices. For example:</p> <ul style="list-style-type: none"> • Level 1 organizations have ad hoc processes and are often seen as chaotic. • Level 2 organizations have repeatable processes and build on past successes. • Level 3 organizations have defined processes and focus on building customer solutions based on pre-agreed need. • Level 4 organizations have carefully managed processes and close, ongoing customer relationships. • Level 5 organizations continually improve and optimize their business development approaches.

Term	Equivalent or Corresponding Terms	Definition and Additional Information
Business Development Phases	Sales/Marketing-Related Activities, Sales Governance, Sales Process, Selling Phases	<p>There are eight generally accepted business development phases:</p> <ul style="list-style-type: none"> • Market identification • Account planning • Opportunity/capture assessment • Opportunity/capture planning • Proposal planning • Proposal development • Negotiation • Delivery <p>Opportunity/capture assessment, opportunity/capture planning, proposal planning, proposal development, and negotiation are most relevant to the bid and proposal environment. In short-turnaround, less-complex pursuits, some of these phases may be combined or truncated. This is often the case in the commercial sector. When involved in proposal support for high-volume, relatively small transaction-level sales, very short business development processes are the norm. However, to produce the best possible results, organizations should use a repeatable, well-managed business development process.</p>
Callout Box	Focus Box, Highlight, Emphasis, Key Point, Attention Point	A design feature with text inside a box or within borders to highlight a key point in the text.
Capture Plan	Opportunity/ Capture Plan	See Opportunity/Capture Plan.
Central Processing		Decision making based on logic and sound arguments. This type of processing is often used by experts but is less common in general than peripheral processing.
Change Management		The application of tools, processes, skills, and principles to transition people from one way of working to another.
Clarification		Communication to eliminate minor irregularities or apparent clerical mistakes in a request for proposal (RFP) or in a proposal. In government settings, these are typically limited and structured exchanges between the Government and offerors that may occur after receipt of proposals. In business or commercial settings, the rules for clarification are often set out in the bid document, but informal engagement to clarify terms may also occur.

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

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

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

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

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

Term	Equivalent or Corresponding Terms	Definition and Additional Information
Gadfly Review		A macro-level review of the entire proposal to ensure it sells your solution, is comprehensive, and tells a consistent story. The Gadfly Reviewer checks compliance with your quality standards for themes, format, graphics, action captions, style, headings, summaries, and introductions.
Ghosting the Competition		A sophisticated tradeoff analysis used to highlight a competitor weakness or downplay a competitor's strength. When using these techniques, competitors are not named. Ghosting and tradeoff analysis are similar. Tradeoff analysis discusses analysis of alternative approaches and then notes why one approach was selected and the others were not. The same technique is used in proposals to ghost the competition. The goal is to provide the customer with information that supports the view that your solution is superior and to cast doubt on the viability of competitors' approaches.
Graphics	Visuals	<p>Visual elements of a proposal that help explain a concept when a text-only description is insufficient or would be difficult to understand. Good use of graphics makes complicated information easier to process and comprehend. Varying graphic types and styles can help you communicate your message and simplify or reinforce your argument and what you are trying to sell.</p> <p>Key practices for developing graphics include:</p> <ul style="list-style-type: none"> • Identifying and drafting graphics before writing text • Ensuring graphics demonstrate an understanding of customer's needs • Keeping graphics simple and uncluttered • Including action captions that add value to graphics
Graphics Label		Titles above proposal graphics that are sequentially numbered throughout a proposal section. Graphics labels allow an evaluator to quickly locate a graphic within a proposal, especially when a proposal contains a list of figures/graphics similar to a table of contents. Labeling should also be applied to the x and y axes of graphs and charts, columns and rows in tables, and features of drawings or illustrations with arrows or lines with explanatory text.
Graphics Template		A visual guide that defines all aesthetic choices for graphics (e.g., colors, shapes, lines, arrows, fonts, indentation, capitalization, and line spacing).

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

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

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

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

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

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

Term	Equivalent or Corresponding Terms	Definition and Additional Information
Persuasive Writing		<p>Writing structure and techniques used to influence prospective buyers to accept your products and services. You can persuade your readers by:</p> <ul style="list-style-type: none"> • Appealing to their reason (supporting assertions with facts, logic, and proof points) • Convincing them that you have their interests at heart (showing you understand their need and know how to help) • Appealing to their emotions (the fear, uncertainty, doubt [FUD] factor) and ghosting the competition • Using templates to enforce key communication elements: <ul style="list-style-type: none"> ○ Theme statement* ○ Summaries (beginning, interim, and ending) ○ Introduction, previews, roadmaps, informal table of contents ○ Informative and telegraphic headings* ○ Action captions* ○ Vision statements ○ Linking statements, transitions ○ Graphics* ○ Page-column format* • Using structure and organization to increase retention and understanding: <ul style="list-style-type: none"> ○ Order according to customer interest (as requested, order of importance, chronological, process, etc.) ○ Summarize at all levels ○ Group similar ideas ○ Present the most important ideas first ○ Design information for the reader <p>*Defined elsewhere in the glossary.</p>
Pre-Qualification Questionnaire (PQQ)		A customer document used at an early stage of a procurement to create a list of viable bidders who will later be invited to tender an offer or respond to an RFP.
Price	Tariff Price, Negotiated Price	The price is the amount you charge your customer for a product or service in a bid.

Term	Equivalent or Corresponding Terms	Definition and Additional Information
Price-to-Win	Winning Price Determination	A process for analyzing competitive and customer data to identify how to package and price a winning offer to a customer. Customers often look for a tradeoff between capability and purchase price before making the purchasing decision. Generally, the following relationship must be true: Customer's Perceived Value \geq Customer's Budget \geq Your Price \geq Your Cost.
Pricing, Bottom-Up	Cost Build-Up	<p>A pricing approach that approximates the size (duration and cost) and risk of a project (or phase) by:</p> <ul style="list-style-type: none"> • Breaking it down into its smallest work components • Estimating the effort, duration, and cost of each component • Aggregating the components into a full estimate <p>Determining duration through a bottom-up approach requires sequencing and resource leveling as part of the scheduling process.</p>
Pricing Strategy	Winning Price Development	Differentiating value and price such that the customer perceives the value of your proposal to them to be greater than the price you are charging. In competitive situations, the winning offer will generally have the greatest differential between value and price.
Pricing, Top-Down	Affordability Analysis, Competitive Price Analysis	A pricing approach that considers the customer's budget and perception of the value of the products or services you are offering as well as an analysis of what your competitors will charge for their offer.
Prime Contractor	Prime, Main Contractor	The contractor that owns the contract with the customer and has full responsibility for its execution. A prime contractor may employ and manage one or more subcontractors or suppliers to carry out specific parts of the contract but is contractually responsible for their performance.
Principles of Influence	Weapons of Influence	Six strategies that can be used to influence decision making. These include reciprocity, consistency, social proof, liking, authority, and scarcity.
Proactive Proposal	Unsolicited Proposal, Sales Proposal, Commercial Proposal, Sales Letter	A proposal generated after an informal discussion with a customer (e.g., a sales visit or phone call) in which an unmet customer requirement is discovered.
Probability of Go	Pgo	The likelihood that a program will be funded and proceed.

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

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

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

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

Term	Equivalent or Corresponding Terms	Definition and Additional Information
Reviews (General)	Color Team Reviews, Quality Checks, Proofing, Consistency Checks, Strategy and Execution Reviews, Sales Reviews of Documents	<p>Periodic assessments of the quality of proposals as they progress through the proposal development process. Reviews are a key tool used by mature organizations. These organizations design their reviews to check key bidding success factors at the appropriate time in the business development cycle. The number and make-up of reviews depends on:</p> <ul style="list-style-type: none"> • Length of the bid cycle • Complexity of the bid • Significance of the bid • Risk factors involved • Investment required to respond
RFP Shaping		The process of influencing customers' thinking in your favor to get elements of an upcoming RFP to reflect your company's key discriminators.
Rhetoric		The discipline that deals with the use of discourse, either spoken or written, to inform or persuade an audience.
Risk Management		Your strategy for managing and mitigating the risks (e.g., technical, financial, and schedule) inherent in a proposal bid. The underlying assumptions are that every offer entails risk and that risk can be contained or reduced with appropriate management.
Risk Management Methods		Methods used to categorize and plan the management of proposal development and delivery risk. Methods include accept, mitigate, transfer, and avoid.
SMART		A mnemonic tool commonly used to test the quality of opportunity plan actions. The letters correspond to the words specific, measurable, attainable/achievable, relevant, and time-sensitive/time-based.
Solicited Proposal	Reactive Proposal	A proposal developed following a formal request by the customer. Your organization may respond to a solicited proposal whether or not there has been previous active contact with the customer.
Solution	Problem Resolution, Design, Method of Provision, Solution Statement	Successful outcomes of the customer's problems on the customer's terms.

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

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Subreviews	Vertical Reviews, Horizontal Reviews, Visual Reviews, Compliance Reviews	<p>Specific subreviews are used to enhance proposals. Generally, reviewers are assigned to specifically look at the storyline alone (e.g., themes and action captions), compliance alone (i.e., does the proposal cover everything required?), and graphics alone for clarity, messaging, and proof. For example:</p> <ul style="list-style-type: none"> • <i>Vertical reviews</i> examine sections in depth for compliance, responsiveness, and persuasiveness. Most detailed, constructive comments result from this type of review. • <i>Horizontal reviews</i> examine a specific aspect of the proposal across all sections. For example, one horizontal review may review theme statements. Another horizontal review may look at headings and the outlining approach by layer. A third review could look at callouts and other forms of highlighting to ensure they are employed consistently throughout. • <i>Visual reviews</i> are a form of horizontal review that examines visuals and graphic elements, including action captions, for consistency and effectiveness. • <i>Compliance reviews</i> evaluate the entire proposal against the compliance checklist to be sure it is in compliance with all the requirements stipulated in the RFP.
Supplier		An organization that provides products and services to customers.
Tacit Knowledge	Implicit Knowledge	The unstated knowledge that people carry in their heads. Tacit knowledge can be shared through discussion, storytelling, and personal interactions or drawn from its owners through interviews and questionnaires. Tacit knowledge has two dimensions. These are one's technical skills, or know-how, and cognitive skills, including beliefs, ideals, values, and mental models.
Tactics	Actions	Steps or tasks taken to achieve an objective.
Tangible Value		Your customer's perception of what the product or service you are proposing is worth to them. Tangible value can be quantified numerically as money saved, time saved, percent improvement, and numbers of savings/reductions.
Taxonomy		A hierarchical structure used for categorizing a body of information or knowledge, allowing an understanding of how that body of knowledge can be broken down into parts and how its various parts relate to each other.

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

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