



# CERTIFICATION PROGRAM SYLLABUS

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# APMP Certification Program

## INTRODUCTION

APMP is the association of record for bid, proposal, business development, capture, and graphics professionals. We offer the world's first, best, and only industry-recognized certification program for professionals working in a bid and proposal environment. APMP certification is the global standard for developing and demonstrating proposal management competency.

This certification syllabus is a list of competencies, each corresponding to skills or scenarios professionals commonly encounter in the bid and proposal environment. These competencies are organized into categories and are rooted in industry best practice, and recorded in the APMP Body of Knowledge and APMP Glossary of Terms.

There are three levels of APMP certification: Foundation, Practitioner, and Professional. This syllabus is designed to provide a basis for certification at each of these levels. It can also be used to inform the design, development, and use of certification training materials. The answers for both the Foundation and Practitioner exams are referenced to the APMP BOK—the official reference guide for all APMP certification exams



## Certification Levels

### FOUNDATION

Foundation Certification is designed for professionals who are relatively new to the bid and proposal environment. To achieve Foundation Certification, you must:

- Be a member of APMP
- Have at least 1 year of experience in a bid/proposal environment
- Pass the Foundation Certification exam

The exam is a 1-hour, open-book, multiple-choice, 75-question pass/fail exam. Exam preparation is determined by level of experience, knowledge of best practices, and participation in training opportunities. APMP offers in-person training courses, printed study guides, and online resources as aids to help prepare for the APMP Foundation Level Certification exam. The questions will test your knowledge and understanding of APMP best practices at a recognized learning level:


- Learning Level 2: Sufficient knowledge and understanding to be able to recognize and distinguish the key elements of APMP best practices.

Foundation Certification is designed to assess understanding of relevant business development concepts. As you read through this syllabus, keep in mind that you need not have personally performed all of required competencies to achieve Foundation Certification. You should, however, be able to demonstrate your understanding of the competency by giving an explanation, listing supporting tools, or providing examples, as appropriate.

### PRACTITIONER

Practitioner Certification is for experienced proposal professionals. 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 (OTE) is a challenging exam that tests participants' knowledge based on:

- A provided scenario
- Your experience with the APMP approach as referenced in the APMP Body of Knowledge (BOK)

The questions will test your knowledge and understanding 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: Analysis of best practices for a given situation or activity within a scenario and how the questions differ from those in the APMP Foundation Exam

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

## PROFESSIONAL

Professional Certification is for professionals with extensive experience and superior leadership and communication skills. Individuals with Professional Certification are recognized for developing others and for improving process and infrastructure to the benefit of their organizations. To achieve Practitioner Certification, you must

- Be an APMP member
- Have achieved both Foundation and Practitioner Certification
- Have at least 7 years of experience in a bid/proposal environment
- Provide a reference who can assess your performance on Behavior and Attitude competencies
- Deliver a Proposal Professional Impact Presentation (PPIP)

During this presentation and interview, you will defend your professional contributions to a panel of evaluators, who will assess your impact and communication and leadership skills.

Professional Certification is design to assess advocacy with regard to business development best practices. As you review the syllabus, keep in mind that to achieve Professional Certification, you must not only understand and have experience performing each of the required competencies, you should also be a leader in increasing these competencies' application within your organization.



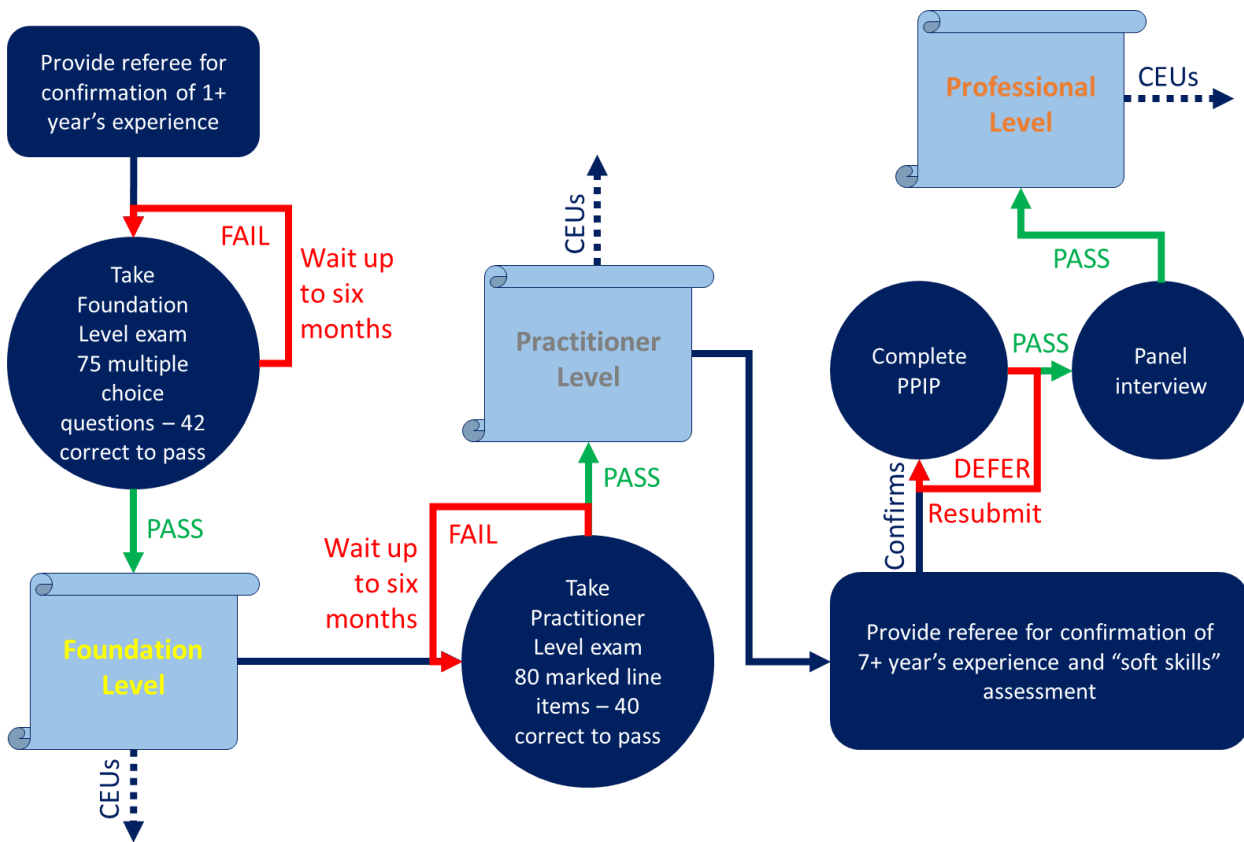
## CONTINUING PROFESSIONAL DEVELOPMENT

Professional development doesn't end with achievement of a new certification level. All APMP-certified professionals are expected to earn and track Continuing Education Units (CEU). The number of CEU you must earn depends on your level of certification. Every 2 years, those with Foundation Certification must earn 20 CEU; those with Practitioner and Professional Certification must earn 40 CEU.

You can earn CEU by participating in training; preparing materials, including articles, websites and blogs, conference presentations, and books on business development topics; attending events; volunteering, and studying independently. You are responsible for tracking your own CEU. Use the Professional Development section of your profile on the APMP website to log your CEUs. CEUs are periodically audited through the site.

## PROFESSIONAL ACCREDITATION PROCESS

The diagram below illustrates the steps to becoming certified by APMP.



**Figure 1: The Professional Accreditation Process:** *Through a formal process of examination, self-assessment, and interview, APMP members can demonstrate their mastery of the knowledge, skills, and attitudes required of the Proposal Management Professional.*

## List of Syllabus Competencies

CATEGORY	COMPETENCY	FOUNDATION	PRACTITIONER	PROFESSIONAL
<b>INFORMATION RESEARCH AND MANAGEMENT</b>				
Information Gathering	Identify gaps in information.	✓	✓	✓
	Help define a plan for information-gathering.		✓	
	Own and operate an information-gathering plan.		✓	✓
	Use senior-level connections/networks to gather information.	✓	✓	
	Analyze information gathered from plan.			✓
Knowledge Management	Use tool(s) to add to and manage the knowledge base.	✓	✓	
	Use existing internal and external knowledge sources for bids.	✓	✓	✓
<b>PLANNING</b>				
Schedule Development	Use multiple tools and methods to develop a proposal schedule.	✓	✓	
	Assess customer timescales and estimate resources required to execute a proposal.	✓		
	Develop a cost estimate for a routine proposal.	✓		
	Match internal proposal tasks to specific bids.		✓	✓
	Assess timescale and resource implications of the customer's procurement process, focusing on efficient use of internal resources.		✓	✓
	Produce cost estimates.		✓	✓
	Define a contingency plan within the schedule.		✓	✓
	Approve a proposal schedule.			✓



CATEGORY	COMPETENCY	FOUNDATION	PRACTITIONER	PROFESSIONAL
	<b>Present a proposal schedule and resourcing requirements internally.</b>			✓
	<b>Continuously monitor and adapt a schedule to reflect internal and external changes.</b>		✓	✓
<b>DEVELOPMENT</b>				
Opportunity Qualification	<b>Use multiple qualification tools to provide objective data for an initial opportunity qualification decision.</b>	✓	✓	✓
	<b>Manage the bid decision process.</b>	✓	✓	
	<b>Use a consistent method/tool to qualify opportunities.</b>	✓	✓	
	<b>Assess strategic opportunities that require senior stakeholder engagement and/or other business units and/or external partners.</b>			✓
	<b>Present data that has been objectively validated using a consistent method/tool at a qualification meeting.</b>		✓	✓
	<b>Contribute to continuous qualification decisions.</b>		✓	✓
Winning Price Development	<b>Manage the process to analyze the customer's budget and competitors' prices.</b>		✓	✓
	<b>Help establish an early winning price target.</b>		✓	✓
	<b>Lead the development of a sound internal business case for positioning customer expectations.</b>	✓	✓	✓
	<b>Identify values to present to the customer in meetings, in the proposal, and in the presentation.</b>	✓	✓	✓

CATEGORY	COMPETENCY	FOUNDATION	PRACTITIONER	PROFESSIONAL
	Define and quantify the values the customer is seeking to achieve.		✓	✓
	Explain the difference between value and price in the proposal.	✓	✓	✓
	Develop quantified, opportunity-specific value propositions that meet customer expectations.		✓	
	Drive the scope of the offer to clearly balance value and price.		✓	
	Lead development of a winning pricing strategy.			✓
	Develop a pricing strategy that reflects a “deal-to-win” (rather than “price-to-win”) approach.			✓
Teaming Partner Identification	Use analysis tools to determine whether to use internal and/or external teaming partners.	✓	✓	
	Help identify suitable internal and/or external partners.	✓	✓	
	Recruit internal and/or external partners.		✓	
	Facilitate meetings to negotiate internal and/or external teaming agreements.		✓	
Proposal Strategy Development	Identify multiple analysis tools available to develop a proposal strategy.	✓	✓	
	Schedule proposal strategy development.	✓	✓	
	Use analysis tools to evaluate customer perception of the organization and the competition.	✓	✓	✓

CATEGORY	COMPETENCY	FOUNDATION	PRACTITIONER	PROFESSIONAL
	Use analysis tools to identify the positive and negative discriminators of the organization for the opportunity.	✓	✓	✓
	Develop proposal strategy statements that “ghost” the competition.	✓	✓	✓
	Assign proposal strategy statements within the writing plan.		✓	✓
	Coach others to develop and use proposal strategy statements.		✓	✓
Executive Summary Development	Identify the key elements required to develop a customer-focused executive summary.	✓		
	Use the executive summary as a proposal briefing tool for others.	✓	✓	✓
	Lead and collaborate in writing of early executive summary.	✓	✓	✓
Content Plan Development	Identify multiple tools and methods available to plan content for proposals.	✓	✓	✓
	Use multiple content planning tools and methods for different sizes and types of proposals.	✓		
	Explain the benefits and appropriate use of content plans.	✓	✓	
	Lead the development and completion of early content plans.	✓	✓	✓
	Approve sections and/or questions that require content planning.		✓	✓
	Use the content planning process to add structure and include reuse material.		✓	✓

CATEGORY	COMPETENCY	FOUNDATION	PRACTITIONER	PROFESSIONAL
	<b>Coach and brief others on using content plans.</b>		✓	✓
	<b>Approve a content plan that follows a customer's required proposal structure.</b>		✓	✓
Requirements Identification	<b>Identify documented customer requirements.</b>	✓	✓	✓
	<b>Identify requirements from customer meetings and documents.</b>	✓	✓	✓
	<b>Identify and develop requirements collaboratively with customer or through sales team.</b>			✓
Compliance Checklist Development	<b>Strip complex requirements from documents issued by the customer.</b>	✓	✓	✓
	<b>Build compliance matrices for both complex and non-complex solutions.</b>	✓	✓	✓
	<b>Drive the internal process to enable decisionmaking for meeting requirements or being non-compliant.</b>		✓	✓
Persuasive Writing	<b>Identify multiple persuasive writing techniques suitable for proposals.</b>	✓	✓	✓
	<b>Apply principles of persuasion in a proposal setting.</b>	✓	✓	✓
	<b>Apply distinct persuasive writing techniques for different types of audiences.</b>	✓	✓	✓
	<b>Explain the benefits of developing persuasive strategies for proposals.</b>	✓	✓	✓
	<b>Approve chosen persuasive techniques for audiences from diverse cultures.</b>		✓	✓

CATEGORY	COMPETENCY	FOUNDATION	PRACTITIONER	PROFESSIONAL
	Explain the difference between active and passive voice and use each in writing.	✓	✓	✓
	Explain principles of writing clearly and apply them in writing.	✓	✓	✓
	Explain the benefits of designing structured documents and apply them in writing.	✓	✓	✓
Graphics Development	Write customer-focused action captions.	✓	✓	✓
	Validate the effectiveness of a graphic based on an illustration and action caption.	✓	✓	✓
	Highlight benefits and discriminators within graphics.	✓	✓	✓
	Explain copyright laws regarding graphic and content use in proposals.	✓	✓	✓
	Explain basic design principles.	✓	✓	✓
	Conceptualize and creatively convert ideas and narrative material to visual forms using a consistent process.		✓	✓
	Plan, coordinate, organize, and assign work to meet deadlines for graphic design projects.		✓	✓
	Design and present senior-level presentations using text and graphic elements.		✓	✓
<b>MANAGEMENT</b>				
Review Management	Explain the purpose and benefits of common functional reviews.	✓	✓	✓
	Organize and participate in common functional reviews.	✓	✓	

CATEGORY	COMPETENCY	FOUNDATION	PRACTITIONER	PROFESSIONAL
	Schedule reviews to meet the size and type of opportunity and customer timescales.		✓	
	Identify and recruit appropriate reviewers.		✓	✓
	Assemble and present information relevant to the review purpose.	✓	✓	✓
	Lead multiple types of functional reviews.		✓	✓
	Ensure that feedback from reviews is acted upon, monitored, and closed.	✓	✓	✓
	Use the content plan and final document reviews to accommodate for a variety of situations.		✓	✓
Kickoff Meeting Management	Prepare an agenda and documentation for kickoff meetings.	✓		
	Brief kickoff meeting attendees.	✓	✓	✓
	Assign tasks to kickoff meeting attendees.		✓	✓
	Use the kickoff meeting to motivate the proposal team.		✓	✓
	Ensure that the proposal team has complete task descriptions.		✓	✓
	Enlist appropriate senior managers to emphasize the importance of a proposal.	✓	✓	✓
Risk Management	Identify proposal development risks within the schedule.	✓		
	Help establish a proposal development risk management strategy.	✓	✓	
	Obtain management approval of the proposal		✓	✓

CATEGORY	COMPETENCY	FOUNDATION	PRACTITIONER	PROFESSIONAL
	<b>development risk strategy.</b>			
	<b>Implement the proposal development risk management strategy.</b>	✓	✓	✓
Report Management	<b>Schedule and develop reports/presentations for senior management and key stakeholders that report proposal progress and identify any arising issues.</b>		✓	✓
	<b>Negotiate solutions with senior management and key stakeholders to resolve any proposal progress issues identified.</b>		✓	✓
Production Management	<b>Plan and schedule the resource, infrastructure, and time required for proposal production.</b>	✓	✓	
	<b>Manage the process for proposal production.</b>	✓	✓	✓
	<b>Create templates for document styles, formats, and visuals.</b>	✓	✓	✓
Lessons Learned Analysis and Management	<b>Obtain internal and external feedback on the proposal.</b>	✓	✓	✓
	<b>Identify systematic proposal process problems and suggest changes.</b>		✓	
	<b>Drive resolution of systemic proposal process problems.</b>			✓
Process Management	<b>Explain the key elements of the proposal development process.</b>	✓		
	<b>Explain the activities required to support the key elements of the proposal development process.</b>	✓	✓	

CATEGORY	COMPETENCY	FOUNDATION	PRACTITIONER	PROFESSIONAL
	<b>Adapt processes to promote work in a variety of situations and opportunities.</b>	✓	✓	
	<b>Lead and drive process improvement.</b>		✓	✓
Virtual Team Management	<b>Explain activities that promote team communication.</b>		✓	✓
	<b>Select tools for managing the virtual proposal process.</b>	✓	✓	✓
	<b>Organize and lead virtual proposal reviews.</b>		✓	✓
	<b>Manage team deadlines.</b>	✓	✓	✓
	<b>Plan workflow to accommodate multiple regions and time zones.</b>	✓	✓	✓
	<b>Organize and manage virtual files.</b>	✓	✓	✓
	<b>Work with team members who are unaccustomed to the virtual team environment.</b>		✓	✓
	<b>SALES ORIENTATION</b>			
Customer Interface Management	<b>Interface directly with internal clients or external customers.</b>		✓	✓
	<b>Manage all communications with internal clients or external customers.</b>		✓	✓
	<b>Discuss all aspects of the proposal with internal clients or external customers.</b>			✓
Opportunity/Capture Plan Development	<b>Explain the relationship between the opportunity/capture planning and proposal phases within the business development lifecycle.</b>	✓	✓	



CATEGORY	COMPETENCY	FOUNDATION	PRACTITIONER	PROFESSIONAL
Winning Strategy Development	Use opportunity/capture plan strategies to drive the development of a proposal strategy within the writing plan.	✓	✓	✓
	Work with others and manage the process to facilitate development of a win strategy.		✓	✓
	Use output from multiple analysis tools to develop the early win strategy.		✓	✓
	Review and adapt win strategies to meet changing circumstances.		✓	✓
	Sell the early win strategy internally and to others involved with the opportunity.		✓	✓
Negotiation Planning	Negotiate for internal resources and/or teaming partner resources.		✓	
	Apply different negotiation techniques in different situations.		✓	✓
Sales Participation	Explain sales methodologies.	✓	✓	✓
	Participate in customer meetings.		✓	✓
<b>BEHAVIOR &amp; ATTITUDE</b>				
Communicating with Others	Use appropriate interpersonal styles and communication methods to clearly convey messages.		✓	✓
	Use a variety of media to engage individuals or groups.		✓	✓
	Correctly interpret messages and respond appropriately.		✓	✓

CATEGORY	COMPETENCY	FOUNDATION	PRACTITIONER	PROFESSIONAL
	<b>Understand a variety of situations' needs and desired benefits. Develop positioning approaches that leverage supportive factors and overcome/minimize barriers.</b>		✓	✓
	<b>Address the needs of key decisionmakers.</b>			✓
	<b>Interact with prospective customers in a manner that builds effective relationships.</b>		✓	✓
Quality Orientation	<b>Accurately check processes and tasks.</b>		✓	✓
	<b>Identify and take corrective action where necessary.</b>		✓	✓
Building Strategic Relationships and a Successful Team	<b>Develop and use strategic relationships.</b>			✓
	<b>Develop direction and involve others through collaboration.</b>		✓	✓
Decisionmaking and Delegating Responsibility	<b>Explain issues and opportunities and the resulting decisions, then delegate implementation of the required activities and responsibilities.</b>		✓	✓
	<b>Implement decisions/initiate action promptly.</b>		✓	✓
	<b>Include others in the decisionmaking process and ensure buy-in and understanding of decisions.</b>		✓	✓
	<b>Allocate decisionmaking authority and/or task responsibility to maximize organization and individual effectiveness.</b>		✓	✓



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