

Capture & Business Development Conference 2022

Online

Event Schedule

Thu, Nov 17, 2022

5:00 AM

Welcome

🕒 5:00 AM - 5:10 AM, Nov 17

🗣️ Speaker



Steven Coles, CPP APMP

Chair
APMP HQ Board of Directors

5:10 AM

Capture & Business Development Professionals Transformation

🕒 5:10 AM - 5:55 AM, Nov 17

BD

Those of you engaging as Capture and Business Development Professionals will need to transform yourself, in order to help you survive and prosper, whatever social and economic headwinds you may face in the future.

This session will present a clear roadmap for the deployment and help to transform yourself.

🗣️ Speaker



Mitsuhiro Seto

Director, Head of Japan Bid and Proposal Management
SAP Japan Co. Ltd.

The Art of Sourcing & Qualifying Best-fit Tender Opportunities

🕒 5:10 AM - 5:55 AM, Nov 17

Opportun...

🗣️ Speakers



Adam Hoyle

Director
TenderEyes Software Ltd.



Alison Smith

Marketing Manager
TenderEyes Software Ltd

Capture in Context

🕒 5:10 AM - 5:55 AM, Nov 17

Capture

Jeremy will explore how capture hangs within the wider eco-system of winning work and business growth. Attendees will takeaway some insights on how to enable successful business growth through capture being embedded at the heart of work winning processes and governance. He'll outline what successful work winning operating models and performance environments look like, key enablers to their success and how to move to winning ways at scale.

🗨️ **Speaker**



Jeremy Brim
Managing Director
Growth Ignition / the bid toolkit

5:55 AM

Break

🕒 5:55 AM - 6:10 AM, Nov 17

6:10 AM

Strategies for Success with the SBA Mentor Protege Program

🕒 6:10 AM - 6:55 AM, Nov 17



The SBA Mentor Protege Program is one of the best things that the SBA has done in the last twenty years. It provides incredible benefits to both Mentors and Proteges, but many people do not understand how the program really works. This presentation covers how the SBA MPP works...and how to make it work for you.

🗨️ **Speaker**



Tommy Benz
Principal + Lead Strategist
GrowthLab

Skeletons in the Closet: Using Pre-mortems to Drive Investment

🕒 6:10 AM - 6:55 AM, Nov 17



Got a senior stakeholder that just doesn't get why you are running a capture years before the deal lands? Struggling to get budget?

A pre-mortem is an effective way to challenge a capture team to consider all the risks in their strategy and identify any weaknesses that had not previously been considered. But if you pitch it right, and set the scene, a pre-mortem can be an effective way to get senior sponsorship, engagement and investment from your leadership team by inviting them to the pre-mortem.

This session will cover the principles of a pre-mortem and how to use that to gain leadership buy-in, using a real case example. You'll get an outline on how to draft the invite and supporting materials and how to encourage the right behaviours in the session.

🗨️ **Speaker**



Mel Kerrison
Senior Capture Manager
QinetiQ

6:55 AM

Break

🕒 6:55 AM - 7:10 AM, Nov 17

7:10 AM

Why Solutions Before Customer Connection and Discovery is a Recipe for a Losing Capture

🕒 7:10 AM - 7:55 AM, Nov 17

Capture

Customers are real people with real needs and like anyone, they want to be heard and understood. They don't want to be sold. They are looking for mission focused partnerships with people they know, like and trust. So, how can you become the person your customers are looking for? Join me in this session and learn about the importance of customer affinity and discovery, as well as what you should be doing before, during, and after your customer meetings to ensure long term success. We will also discuss approaches to avoid at all costs. Please note that what we go over in this session will have application in both your personal and professional lives, so look at it as a two for one special.

🗣️ **Speaker**



Chris Pereschuk

Senior BD/Capture Manager
Dine Development Corporation

Preparing for the Award and Managing Pipeline Expectations with Acquisition Delays

🕒 7:10 AM - 7:55 AM, Nov 17

BD

🗣️ **Speaker**



Jason Servary

Chief Strategic Officer
Innoplex, LLC

Opportunity Management Matters - Pipeline Construction & Maintenance

🕒 7:10 AM - 7:55 AM, Nov 17

Opportun...

Identifying leads to pursue in the immediate, short, and long-term provides a laser focus on pursuits. Use the 5-I's to construct and maintain your pipeline.

🗣️ **Speaker**



Jo Deans

President & CEO
Capstone Management Consulting, LLC

7:55 AM

Break

🕒 7:55 AM - 9:00 AM, Nov 17

9:00 AM

Capture Practitioner Certification Preliminary Training by BidCraft - All Welcome

🕒 9:00 AM - 9:30 AM, Nov 17

Capture

This session is open to all CBDC registrants and will discuss the APMP Capture Practitioner certification - benefits, prerequisites, and the exam. You will learn about the BidCraft Academy course for CBDC - how it works and what are the next steps if you join the CBDC Certification Event.

🗨 Speakers



Jon Darby
Managing Director
BidCraft



Eve Upton
Consultant
BidCraft

9:30 AM

Break

🕒 9:30 AM - 10:00 AM, Nov 17

10:00 AM

Welcome

🕒 10:00 AM - 10:10 AM, Nov 17

🗨 Speaker



Rick Harris
Chief Executive Officer
Association of Proposal Management Professionals

10:10 AM

Chemical Warfare for Competitive Sales

🕒 10:10 AM - 10:55 AM, Nov 17



There are four key neurotransmitters (brain chemicals) that can be used to enhance and accelerate every business transaction. Using the mnemonic DOSE, the presentation will cover the role that each chemical plays and how to ethically manipulate their production. By DOSEing his sales and business development narratives (oral presentations and written proposals), the presenter has used this technique to amass an 82% win rate on over \$2Bn worth of competitive awards that he led or contributed to as a capture team member.

🗨 Speakers



Jeff Goldfinger
Founder
Xtra Mile Training and Development



Kate Justice

The Art of Shaping Requirements

🕒 10:10 AM - 10:55 AM, Nov 17



This presentation discusses what the art of shaping requirements is (and is not). It defines/re-fines the cycle of shaping for both existing and new business opportunities. It discusses a methodology called Mutually Assured Requirements Shaping (MARS); and provides new/enhanced skills for leadership/executives, operations/line managers and staff, and BD staff.

🗣️ Speaker



Len Miller
CEO
Hinz Consulting

Making it Count: Maximising Your Time with Your Client

🕒 10:10 AM - 10:55 AM, Nov 17

Capture

Getting face-to-face (or screen-to-screen) time with clients and prospects and then maximising the benefit of that time, is one of the most crucial elements of the capture process.

How can you get their attention, so they will meet with you? In particular if it's before the start of their procurement cycle or if meeting isn't a defined stage in their buying process?

Once you have the meeting in place, what do you discuss and even present?

To answer these questions, we'll share our experiences of working in the capture space and provide you with checklists to help plan, prepare and deliver interventions that position your organisation to win.

Takeaways:

Attendees will takeaway:

- Learnings from our experience of supporting our clients through the capture process
- Checklists to help plan, prepare and deliver client/prospect interventions

🗣️ Speakers



Mrs. Lorraine Baird, CPP APMP
Director, Strategic Proposals
Strategic Proposals



Graham Ablett
Director
Strategic Proposals

10:55 AM

Patri Score Demo

🕒 10:55 AM - 11:00 AM, Nov 17

Sponsored

🗣️ Speaker



Joshua Ellars
Founder
Patri

11:00 AM

Break

🕒 11:00 AM - 11:10 AM, Nov 17

11:10 AM

Getting, Shapping, and Gaming Information-to-Win

🕒 11:10 AM - 11:55 AM, Nov 17

Sponsored

Offerors who understand the customer's objectives, requirements, challenges, and budget, and the competitive environment are in the best position to deliver a winning proposal. Becoming the best-informed offeror is challenging. Using our Information-to-Win process you will collect meaningful information, use that information to shape the bid, and make informed decisions that support the win strategy - all of which put you in the best position to deliver a winning proposal.

🗨️ Speaker



Brenda Christ

Vice President
Lohfeld Consulting Group, Inc

👥 Sponsored By:



Lohfeld Consulting Group, Inc

Capture Management and Planning for Small Businesses in the Post COVID Era

🕒 11:10 AM - 11:55 AM, Nov 17

[Capture](#)

🗨️ Speaker



Marc Zoellner

Senior Vice President - Growth
The Building People

Pitch Perfect Sales Presentations

🕒 11:10 AM - 11:55 AM, Nov 17

[BD](#)

Make winning sales presentations. Learn the techniques the pros use to sell your solution and/or influence the RFP. Use the latest behavioral psychology and neuromarketing techniques. Use what you learn during session to make a clear, compelling presentation that gets buy-in and improves your success rate. It's easy—when you know how to do it.

- Discover the 3 reasons people buy
- Improve sales
- Learn the latest behavioral psychology and neuromarketing techniques
- See how to get prospects to buy into your solution
- Get the recipe for persuasive presentations

🗨️ Speaker



Mike Parkinson

Principal
24 Hour Company

11:55 AM

How Lohfeld Consulting Helps You Win! Demo

🕒 11:55 AM - 12:00 PM, Nov 17

[Sponsored](#)

Speaker



Brenda Christ
Vice President
Lohfeld Consulting Group, Inc

12:00 PM

Break

🕒 12:00 PM - 12:10 PM, Nov 17

12:10 PM

No More Wild Goose Chases: How to Drive Organizational Alignment and Discipline on Pursuit Strategy

🕒 12:10 PM - 12:55 PM, Nov 17

Sponsored

There are few things more wasteful to an organization nor as frustrating for capture and business development professionals than navigating internal politics when deciding whether or not to pursue an opportunity. Yet, it might feel impossible to get executives and other internal influencers on board with an aligned capture strategy that hinges on efficient and effective deal qualification.

Join long-time GTM leader Josh Ellars as he covers best practices and strategies for driving organization buy-in for better opportunity qualification as well as optimal strategies for effective go/no-go decisions. Topics will include:

- Understanding organizational perspectives on prioritization
- Best practices for helping organizations align behind formal, well-documented qualification processes
- Sample frameworks for qualification
- Strategies and tools that can drive this change across your organization

Speaker



Joshua Ellars
Founder
Patri

Sponsored By:



Capture: Easy as Pie, the Recipe for Success!

🕒 12:10 PM - 12:55 PM, Nov 17

Capture

intended takeaways:

- Capture Process is like a good recipe. With the right preparation and quality ingredients, if you follow a good recipe, you can expect good results consistently.
- You need Knowledge and Skill to obtain repeatable results. You can't expect a good pie every time unless you bake one (or a few) yourself
- Mentoring and Coaching in the early stages sets you up for success. Companies ("The Bakery") have a responsibility to provide assignments and support to help master your craft.

🗣️ Speaker



Mark Falco

Senior Business Development Director and Business Winning Capture Strategist
BAE Systems

Converting pWin to We Win!

🕒 12:10 PM - 12:55 PM, Nov 17

BD

In today's market, winning companies focus their efforts (and funds) on the right opportunities rather than following an "if it's got a pulse, it gets a proposal" approach. This makes their sales process more efficient - and saves bid-and-proposal costs. **But how do you pick the right opportunity?** This session will explore how early competitive analysis, focused on the specific information needs of your own leaders within your own market, helps them make better decisions - **saving time and putting money in your pocket** .

🗣️ Speaker



Randy Richter

Retired - at least a bit!
Richter & Company

12:55 PM

SMA Talent On Demand (TOD) Demo

🕒 12:55 PM - 1:00 PM, Nov 17

Sponsored

🗣️ Moderator



Jacque Keats

Chief Operating Officer
SMA

1:00 PM

Break

🕒 1:00 PM - 2:30 PM, Nov 17

2:30 PM

Management Consulting Makes the Business Capture Process Work

🕒 2:30 PM - 3:15 PM, Nov 17

Capture

Sponsored

Typically, before a draft request for proposal is released, the business capture team's work has begun. At the very heart of a successful capture process is the management consultant's analytic skills applied across various business capture tasks. John Prior, Vice President, Management Consulting at SMA, Inc., and Dave Patterson, Executive Advisor for Business Capture at SMA, Inc. will share with the audience their expertise and experiences in winning new business using management prowess to execute the business capture processes.

🗣️ Speakers



John Prior

Vice President of Management Consulting
SMA




Dave Patterson

Executive Advisor
SMA

 Sponsored By:



Aligning Your Capture Management Function to Your Organization: Navigating the Challenges of a Small to Mid-sized Capture Team

 2:30 PM - 3:15 PM, Nov 17

Capture


 Speaker



Michael Kim

Director - Capture Management
Conduent

Get The Information You Need with Seven Quality Questions

 2:30 PM - 3:15 PM, Nov 17

Sales Professio...

Capture/Sales Rule #1: “You have to A-S-K to get the business”. Capture/Sales Rule #2: When everything is equal, price becomes the differentiator.

Regardless of whether your customers are government agencies or commercial businesses, time with decision makers is always at a premium in the “roaring twenties”. When you have the opportunity to talk to your prospect, having a plan to A-S-K quality questions is a key element to collecting quality information. Collecting quality information is a key element to developing a benefits-based differentiated solution.

In this session, participants will learn to A-S-K the “Seven Quality Questions” (SQQs) as adapted for the business capture environment by the presenter from *The Coaching Habit: Say Less, Ask More & Change the Way You Lead Forever*. Participants will learn the SQQs, the power of question sequencing, the importance of the “sales spotlight”, and the secret of the most important question of all ... The “AWE” question. If you are not using a structured questioning approach to gain information from your customer contacts, learning to use the SQQs is guaranteed to make a difference in your information collecting.

 Speaker




Mark Wigginton

Executive Advisor and Capture Coach
Shipley Associates


3:20 PM

Break

 3:20 PM - 3:30 PM, Nov 17

3:30 PM

Commercial-Sales and BD-The Ultimate Tag Team

 3:30 PM - 4:15 PM, Nov 17

Capture

Sales and Business Development are oftentimes the first interaction a potential client has with any given organization. Once the relationship is established, the opportunity(s) have been identified and the request for quote is received, it is then up to the commercial team to provide a proposal that is not only price competitive but also compliant with the potential client's requirements. Both teams are extremely critical to the success of any given organization. These two teams require unique skillsets that can take years to develop before one is considered "professional". What happens when the two teams become siloed and are no longer functioning "in step"?

I've worked for very large to extremely small organizations. I've held roles where I was a one-person team from sales, commercial and project management, business development all the way through collections. I've also worked as a part of a singularly focused team required to interface with other distinctive groups whose goal is to align toward a common purpose. These two business models each have their own set of pros and cons. I'm going to discuss what I have seen that works and doesn't work with each approach. I'm going to present a hybrid approach to ensure that sales and commercial present a united front to potential clients resulting in the ultimate tag team.

🔊 Speaker



Jeremy Steward

Commercial Director
Sulmara Subsea

The APMP Body of Knowledge

🕒 3:30 PM - 4:15 PM, Nov 17

BD

The APMP Body of Knowledge (BOK) is an excellent resource for BD practitioners at all levels and is included in your APMP subscription, but I have found that many members have never used it and some - say it isn't so - don't even know it exists.

My session will guide you through the APMP BOK to show you some of its greatest features and articles. The session is for BD practitioners at all levels of experience. Hey, if an old dude like me can learn from it, you probably can too. Naturally, if you already use it, you may want to skip my session.

One of the most important skills a BD professional can master is time management. In the interest of managing mine, I have included a direct excerpt from the APMP BOK to give you an overview of the APMP BOK.

"The APMP Body of Knowledge (BOK) represents the collected wisdom of the world's leading professionals in proposal, bid, and opportunity management and business development. (Sic)

It is a resource for professionals at all levels, from production team members through senior management. The best practices collected here are designed to apply to diverse and wide-ranging geographies, business sizes, and procurement environments.

A list of best practices forms the backbone of each APMP BOK chapter. These are considered the most important things business development professionals should know about each topic in the APMP BOK. In many chapters, you can deepen your understanding by reading explanations of recent trends in a given space, how best practices can be applied in diverse environments, and common mistakes to avoid.

🔊 Speaker



Scott Zurschmit

Choctaw Global 8(a)

Data Analysis to Create Competitive Differentiation

🕒 3:30 PM - 4:15 PM, Nov 17

Opportun...

What if you could quantify the benefits and risks of your offer for your customer? for your organization? This session will explore how you can use data to tailor your offer to maximize customer benefit while mitigating risk and maximizing margin generation for your organization.

Take a journey with me through three cases where we leveraged data to access new international markets within the aerospace industry. We will discuss how the lessons from those cases provide opportunities for any organization to leverage their data to hone their offers and create sustained competitive advantage.

Key takeaways:

- Use of data to gain greater insight into your value proposition
- Data-driven go/no go decision making
- Alignment of data use throughout the entire business development life cycle.

👤 **Speaker**



Ryan Graves

Pursuit Manager
WSP Canada Inc.

4:15 PM

Break

🕒 4:15 PM - 4:30 PM, Nov 17

4:30 PM

Sales: A 4-Letter Word?

🕒 4:30 PM - 5:30 PM, Nov 17



For decades “sales” has been a dirty word within some legacy business winning circles and organizations. It was common to hear:

“We’re not selling anything to our customers, we’re solving problems.”

“Nobody wants to be “sold” to; we provide solutions.”

“We don’t identify as ‘sales’ professionals; that’s for people selling widgets.”

Welcome to the new reality. Customers want to be persuaded. They want to engage in consultative business discussions to find solutions and build a business case for a buying decision. We can call it “capture” or we can call it “sales”; or we can agree that our job as business winning professionals is to help the customer make the best buying decision – by selling them what they need ONCE WE BUILD A BUSINESS CASE.

During this session, we will explore ways to better engage customers and stakeholders to help advance a sales opportunity in competitive markets. We’re all competing to win – often our most powerful discriminator is “how we sell”, not “what” we sell.

👤 **Speakers**



Brad Douglas

EVP Global Strategy
Shipley Associates



Sam Singh

Managing Partner
Shipley India

Bridging the Gap: The Case for Building an Independent Capture Team in your Organization

🕒 4:30 PM - 5:30 PM, Nov 17



Many organizations rely on a handful of often multi-hatted staff to perform capture services and overlap their work with proposal management and other tasks.

This session provides roadmaps for moving from wavering capture services to a fully-fledged Capture Management team. We will cover everything from identifying candidates to mapping career paths (between capture, proposals, and beyond) to clearing the path with senior management.

Semi-interactive, participants will be invited to consider their unique stations in the context of practical ways to develop a Capture Team (and help it grow over time). Partly a career conversation, this session also covers elements of why a business would invest in a disciplined capture process.

 **Speaker**




Lesli Froeschner, PMP, CF APMP (she/her)

Director, Capture Management Services, Engineering Services, Canada
University of Florida, PMP, CF APMP


5:30 PM

Break

 5:30 PM - 6:30 PM, Nov 17

6:30 PM

Capture in MS Word

 6:30 PM - 7:15 PM, Nov 17

Capture

Running your capture process in Microsoft Word today? Use comments and highlights to mark requirements, ownership assignments, or clarifications? Join this session to see how these common Word techniques can be automated AND get a free MS Word capture tool!


 **Speaker**



Jason Anderson

VP, Sales & Proposal Strategy
Expedience Software

New Kid on the Block Post Pandemic

 6:30 PM - 7:15 PM, Nov 17

BD

Join me in the lessons I've learned along the way being the new kid in a new market post pandemic! We will discuss strategies, experiences and how to celebrate those wins!


 **Speaker**



Krystel DeHerrera

Strategic Marketing/Business Development Leader
RS&H

Quantitative Pipeline Management & Bid Decisions

 6:30 PM - 7:15 PM, Nov 17

Opportun...

How are you assessing the opportunities that go into your pipeline?

How are you conducting your Bid/No Bid process?

While there is nothing wrong with a “gut check” as part of your decision process, using data derived from a quantitative opportunity scoring model can be a more reasoned approach to revenue forecasting.

This session will discuss a pipeline management model that supports quantitative bid decisions.

We will examine:

- The Long-range Strategic Plans as a foundational element for determining revenue goals and what constitutes an “attractive” opportunity.
- Constructing a Pipeline Workbook based on each year’s Strategic Plan.
- A Pipeline Workbook that includes:
 - *Pipeline Dashboard*
 - *Bid Scoring Model that determines Pwin*
 - *Opportunity Factoring to determine pipeline total value*
 - *Revenue Forecast Chart for at-a-glance determination of pipeline health against strategic goals*
- Best practices for conducting a meaningful Pipeline Review Meeting.

This session targets business owners and business development teams (which might be the same thing in a micro business) involved in finding, qualifying, pursuing, and bidding government opportunities. This methodology uses MS Excel as an alternative to expensive CRM platforms, making it within reach for companies of all sizes.

Speaker



Shannon Lindauer

President & Sr. Consultant
The Federal Proposal Experts (FPEX)

7:15 PM

Break

🕒 7:15 PM - 7:30 PM, Nov 17

7:30 PM

Client Experience in Professional Services - Solving the World's Biggest Problems Together

🕒 7:30 PM - 8:15 PM, Nov 17

BD

Uncertainty truly lies at the heart of our changing world. Together with our clients, we can create lasting community benefit. ‘Together’ means we work in partnership, with our clients and with each other. ‘Create’ means that we come up with new ideas and innovative solutions to meet the challenges that our clients face. ‘Lasting community benefit’ means we have, at our core, a deep sense of responsibility to make the world in which we live and work a better place. All of this can be supported and dramatically enhanced through the framework of Client Experience. How do you build trusted relationships? That lead to solving the world's biggest problems - future energy, future water and future communities

Speaker



Tina Coombes

Senior Client and Business Development Partner
GHD (New Zealand)

Building the Sales to Bid Bridge

🕒 7:30 PM - 8:15 PM, Nov 17

Opportun...

Sales are from Mars, proposal teams are from Venus.

Bid & proposal people often get frustrated with late requests to support bids and proposals and the feeling that they don't have enough information - customer and/or solution - to plan and produce a winning proposal. Not enough time, not enough good info - what could possibly go wrong?

Salespeople don't always understand how best to work in and with good bid & proposal planning and preparation. They have sales targets to meet, can't always get to talk to prospects or customers, and are often not comfortable as writers. Again, what could possibly go wrong? Or right?

This interactive session looks at and discusses this common situation, the consequences (and costs) and presents for discussion simple techniques for building an enduring bridge between the two worlds.

Speaker



Jeremy Pollard

Director, Senior Consultant
Shipley Asia Pacific

My Title is not Capture or BD, but I do the Job

🕒 7:30 PM - 8:15 PM, Nov 17

This session caters to professionals in SMB and large organizations who do not have Capture and Business Development titles but are involved in similar roles and responsibilities.

Speakers



Jody Stoehr

CRO
RocketDocs



Jamie Ninneman

Global Lead, SAP Bid & Proposal Management
SAP America, Inc.



Philip Marion

Manager, Sales Advancement
Q2 Software

8:15 PM

Closing Session

🕒 8:15 PM - 8:30 PM, Nov 17