

# CSK

# Proposal Management Training

*Programme 2009* v1.3





## Course Overview

- **B1A. General BidMaster™ „Standard“ (3 days)**  
– basic training for entire bid/proposal teams, including proposal presentation and negotiation
- NEW** ➤ **B1B. General BidMaster™ „Compact“ (2 days)**  
– basic training for entire bid/proposal teams
- **B2. Storyline Workshop (1 day)**  
– develop a winning proposal strategy and a convincing storyline
- **B3. Proposal Production (1 day)**  
– all about the physical production of the proposal document
- **B4. Complex Proposal Management (1 day)**  
– efficient project management in large or complex proposals
- **B5. The Bid Presentation (1 day)**  
– the successful presentation of the proposal
- **B6. Negotiation Training (1 day)**  
– the final phase
- NEW** ➤ **B7. Successful Sales Management (1 day)**  
– a necessary precondition for successful offers
- **B8. APMP Accreditation Training**  
– specific preparation for the APMP Foundation Level exam (through CSK partner company)
- NEW** ➤ **B9. Pricing and Value Creation (1 day)**  
– understand pricing mechanics, and develop the „right“ price
- NEW** ➤ **B10. Convincing Illustrations and Graphic Design (1 day)**  
– maximise your bid/proposal documents with convincing illustrations and graphic designs
  
- **individual, custom tailored training courses** (on request)
- **personal coaching** (on request)

The bid and proposal management courses are designed for groups up to 15 participants. The communication courses (The Bid Presentation and Negotiation) are for groups between 6 – 12 participants.

**NEW** new as standard module in 2009



## CSK Proposal Management Training – The Concept

### Target Audience

- Bid/proposal managers
- Proposal team members: all those involved in developing a proposal
- Support staff (graphics pool, secretarial or assistant staff)

### „Maximum Practice – Minimum Theory“

CSK developed the training courses on a proven workshop concept: „Maximum Practice – Minimum Theory“ is our slogan. During these interactive courses, the participants are fully involved and they receive practical and structured feedback from the trainers and other participants. The concise theory sections provide the participants with practical instruments to assist them in their daily work.

### Duration and Dates

The training duration is between one and three days. The earlier you book a course the more flexible we can be with the planning.

### Location

As the training courses are designed to be in-house seminars, they are held at your premises or at a seminar location. We would be glad to assist with the booking. Some of the training courses are also held as public workshops.

### The Trainers

We only use experienced trainers with an excellent track record. They are experienced consultants or line managers. We are happy to provide their CVs.

### Quality

Our quality is guaranteed. If the participants' average rating is below „good“, our customers are free to decide if and how much they are willing to pay for the training (expenses excluded).

### References

We provide top references on request.

### Tailor-made Training Courses

We can also provide a tailor-made training course in line with your requirements. Please contact us.

### Languages

English, German. Other languages on request.



## Terms and Conditions

Prices are excl. expenses and (if applicable) VAT.

Included:

Handout copies (exception: General BidMaster) and a course confirmation for each participant are included. We also send you a summary of the participants' feedback results.

Short term cancellations below one week before training start will be charged at 50% of the agreed rate.

Insurances are not included in the contract.

## Further Information and Application

Still open questions? We are happy to answer them on the phone, personally, or by e-mail.

Please call us, send a fax or an e-mail ([training@cskmanagement.com](mailto:training@cskmanagement.com)).

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*Bid Alliance*

CSK is proud to be a member of the Bid Alliance, the world's first global network of independent business development and proposal management consultancies. The Bid Alliance partners operate in Germany, Switzerland, UK, Finland, UAE, USA, and India.

## Course Programme 2009



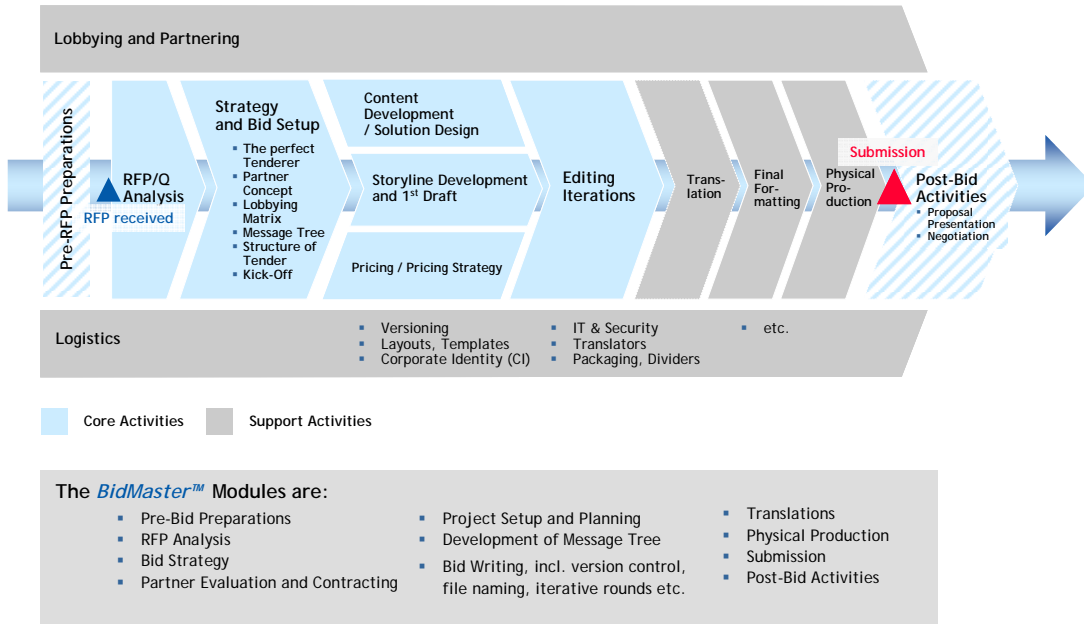


# B1A/B. General BidMaster™ – basic training for entire bid/proposal teams

## Scope

This 2 resp. 3-day training course is designed to setup entire Bid/Proposal Teams. It covers the BidMaster™ Approach and contains many practical examples and exercises. The BidMaster™ Approach provides methods, tools, and structures to cover the entire proposal process, from RFP to document production, from proposal office installation to proposal presentation.

## The BidMaster™ Process



© CSK Management

Besides discussing key principles of proposal development, we go through the entire process using real-life examples. While doing this, we will present (and practise) a number of tools and concepts that help to develop a winning proposal – checklists, templates, and methodologies.

**Templates**

- MS Word based
- Easy-to-use
- ensures consistent layout
- corresponds to message tree
- allows stringent version control

**Version Control System**

- Allows permanent version tracking
- Includes file naming conventions

**Filing System**

- File naming system and file structure

**Style Guidelines**

- Style Guidelines to use a consistent and effective language in order to maximise communication efficiency

**Layout Guidelines**

- Allow consistent layout without complex formatting procedures
- Increases efficiency

**Revision History**

- Allows tracking of changes within documents
- Easy to use

**Message Tree**

The Main Message

- Chapter 1 (Overview of the Bidder)
- Chapter 2 (Marketing Strategy)
- Chapter 3 (Business Case)

**Project Mgmt Tools**

- Enable Bid Writing Team to work most efficiently

**Checklists**

Bid Production Checklist

No.	Chapter	Message Line	Done	Final
1	Summary			
2	Company			
3	Product Overview			
4	Technical Details			
5	Commercial Request			
6	Management Concept			
7	Marketing Research			
8	Terms and Conditions			
9	Next Steps			
10	Attachments			
11	Checklist			

**BidMaster™ Process**

The BidMaster™ Process



## Content

- Pre-proposal activities (what can/must be done before the RFP (Request for Proposal)?)
- RFP analysis, the key principles of bidding, proposal strategy and proposal structure
- The Message Tree – the convincing storyline
- Structure and formulation of proposal text (including „Style Guidelines“)
- Formatting and the use of the BidMaster™ templates
- Physical production (printing, binders, registers, CD-ROM, packaging etc.)
- Post-proposal activities (lobbying, proposal presentation, negotiation)

## Method

- Interactive 2-day/3-day workshop with max. 20 participants
- Theory inputs and practical tools
- Exercises and real-life case examples
- Qualified and structured feedback from trainer and participants

## Duration

B1A. General BidMaster™ „Standard“: 3 days (~ 08.30 a.m. – 5.30 p.m.)  
B1B. General BidMaster™ „Condensed“: 2 days (~ 08.30 a.m. – 5.30 p.m.)  
(without proposal presentation and negotiation)

## Pre-qualification

not needed

## Languages

German, English



## B2. The Storyline Workshop

### – develop a winning bid strategy and a convincing storyline

#### Scope

The success of a proposal depends from the right bid strategy and from convincing arguments behind this strategy: The storyline. The message tree workshop addresses the systematic development of a bid strategy and a logically structured, easy-to-understand storyline, based on a so-called message tree.

This course addresses not only proposal managers and other writers (such as subject matter experts) but also sales people who are involved in the proposal process.

#### Content

- The participants learn the success factors of a winning proposal (The Six Winning Elements of Merlin)
- The participants develop „Key Messages“ and write a logical, convincing storyline using the concept of a Message Tree
- The participants practise the formulation of proposal text using real examples applying the seven Style Guidelines.

#### Method

- Interactive 1-day workshop
- Theory inputs and practical tools
- Exercises and real-life case examples
- Qualified and structured feedback from trainer and participants

#### Duration

1 day (~ 08.30 a.m. – 5.30 p.m.)

#### Pre-qualification

not needed

#### Languages

German, English



## B3. Proposal Production

### – all about the physical production of the proposal document

#### Scope

This workshop is for Proposal Office Managers and Proposal Managers and covers all areas that cope with the physical production of the bid/proposal document.

#### Content

- Setup of the proposal document structure
- Templates and layout
- The first impression: binders, paper, register, packaging, CD-ROM
- Version control
- Production logistics
- Time planning

#### Method

- Interactive 1-day workshop
- Theory inputs and practical tools
- Exercises and real-life case examples
- Qualified and structured feedback from trainer and participants

#### Duration

1 day (~ 08.30 a.m. – 5.30 p.m.)

#### Pre-qualification

not needed

#### Languages

German, English



## B4. Complex Proposal Production (two days)

### – efficient project management in large or complex proposals

#### Scope

This 2-day training is designed to help bid/proposal managers managing large and complex proposal projects. It covers most of the topics of the General BidMaster course but it focuses much more on the project management aspect. It covers the BidMaster™ Approach containing many practical examples and exercises. The BidMaster™ Approach provides methods, tools, and structures to cover the entire proposal process, from RFP to document production, from proposal office installation to proposal presentation.

Besides discussing key principles of bidding, we go through the entire process using real-life examples. While doing this, we will present (and practise) a number of tools and concepts that help to develop a winning proposal – checklists, templates, and methodologies.

#### Content

- Structure and key elements of a complex proposal development processes
- Allocation of bid/proposal teams, roles and responsibilities
- Specific dangers of bid/proposal projects
- RFP analysis, bid/proposal strategy, kick-off and review-meetings
- Use of critical path planning in the proposal management process
- Hints, tips and tricks, and specific proposal management tools

#### Method

- Interactive 2-day workshop
- Theory inputs and practical tools
- Exercises and real-life case examples
- Qualified and structured feedback from trainer and participants

#### Duration

2 days (~ 08.30 a.m. – 5.30 p.m.)

#### Pre-qualification

not needed

#### Languages

German, English



## B5. The Proposal Presentation

### – the successful presentation of the proposal

#### Scope

With the submission of the document, it is not over yet: The proposal presentation often decides between loss or win. This workshop gives you the tools and methods to develop a well-structured, convincing and easy-to-understand proposal presentation to make sure the customer receives the right messages.

#### Content

- Structure and content of a successful proposal presentation
- The right layout/structure of Powerpoint slides
- Key success factors of successful presentations
- The Message Tree Principle
- How can I convince the audience? – Presentation basics
- „The Red Team“ – We simulate difficult customers and ask those tricky questions...

#### Method

- Interactive 1-day workshop
- Video training
- Theory inputs and practical tools
- Exercises and real-life case examples
- Qualified and structured feedback from trainer and participants

#### Duration

1 day (~ 08.30 a.m. – 5.30 p.m.)

#### Pre-qualification

not needed

#### Languages

German, English



## B6. Negotiation

### – successful with the CSK system

#### Scope

Successful negotiation is not a question of how tough you are. It is much more dependent on your thorough, systematic, and tactically smart preparation, as well as your professional discussion leadership. This training covers all of that.

#### Content

- The participants learn the success factors of a successful deal.
- The participants learn, which preconditions need to be met, and what a so-called win-win situation really means.
- The participants learn practical rules for a targeted negotiation approach.
- The participants practise using real examples in roleplays.
- The participants see themselves on video, optimise and improve their negotiation behaviour.

#### Method

- Interactive 1-day workshop with 6–9 participants (max. 12)
- Video training
- Theory inputs and practical tools
- Exercises and real-life case examples
- Qualified and structured feedback from trainer and participants

#### Duration

1 day (~ 08.30 a.m. – 5.30 p.m.)

#### Pre-qualification

not needed

#### Languages

German, English



## B7. Professional Sales Management

### – a necessary precondition for successful offers

#### Scope

A solid customer relationship is the most important precondition for a successful offer. This workshop goes through 16 key success factors of best-practice sales management.

#### Content

- The 16 elements of successful sales management
- Who is my client?
- Client's roles – how to systematically understand my client
- How sustainable relations develop
- Development of an account strategy and concrete action plans using real-life customer examples

#### Method

- Interactive 1-day workshop with 6–9 participants (max. 12)
- Theory inputs and practical guidelines
- Qualified and structured feedback from trainer and participants

#### Duration

1 day (~ 08.30 a.m. – 5.30 p.m.)

#### Pre-qualification

not needed

#### Languages

German, English



## B8. APMP Accreditation Training (two days)\*

### – specific preparation for the APMP Foundation Level exam

#### Scope

This training prepares experienced bid managers for the APMP Foundation Level exam.

After this 2-day training, the bid manager will be in a position to pass the demanding APMP Foundation Level exam (on his own, in an on-line multiple choice test).

More information on the APMP Accreditation Programme can be found on [www.apmp.org/ca-16.aspx](http://www.apmp.org/ca-16.aspx)

#### Content

- Introduction into the basics of Bid Managements according to the APMP Body of Knowledge
- Specific APMP terminology (syllabus) and focus of the APMP exam
- Methodical preparation for the exam procedure and hints for a successful APMP accreditation

#### Method

- Interactive 2-day workshop with 6–9 participants (max. 12)
- Theory inputs and discussion rounds
- Exercises and real-life case examples
- Qualified and structured feedback from trainer and participants
- Short sample test

#### Duration

1 day (~ 08.30 a.m. – 5.30 p.m.)

#### Pre-qualification

- for the APMP Accreditation: 1 experience in a bid environment
- the APMP membership is not necessary

#### Language

English (So far, APMP offers the accreditation exam in English only)

*\* This course is provided through a CSK partner company*



## B9. Pricing and Value Creation

### – understanding pricing mechanics and develop the „right“ price

#### Scope

The „right“ price tag is one of the most difficult challenges of proposal development. This pricing workshop helps you to understand how customers look at your price, which pricing strategies you can apply, and what elements you need to include in your price calculation.

#### Content

- How critical is the „right“ price tag, and how customers perceive your pricing
- Which types of pricing strategies you should use
- What are the elements and methods to develop the pricing
- Why price and value are often worlds apart
- About value propositions and about the price trap

#### Method

- Interactive 1-day workshop with 6–9 participants (max. 15)
- Theory inputs and practical guidelines
- Exercises and real-life case examples
- Qualified and structured feedback from trainer and participants

#### Duration

1 day (~ 08.30 a.m. – 5.30 p.m.)

#### Pre-qualification

not needed

#### Languages

German, English



## B10. Convincing Illustrations and Graphic Design

### – develop convincing illustrations, charts, and visualisations

#### Scope

*A picture is worth a thousand words.* This famous saying also applies (very much) to proposals. This workshop shows you how convincing graphic illustrations, charts, and strong visualisations can be created in order to make sure you get the message across.

#### Content

- The participants will be shown „good“, „not-so-good“, and „bad“ graphic illustrations
- The participants learn the use of qualitative and quantitative charts
- They will learn about colours, fonts, and shapes
- They will apply the 7-second-rule
- They will learn how to get the right message across by using the right picture.

#### Method

- Interactive 1-day workshop with 6–9 participants (max. 12)
- Theory inputs and practical guidelines
- Exercises and real-life case examples, using Microsoft Powerpoint
- Qualified and structured feedback from trainer and participants

#### Duration

1 day (~ 08.30 a.m. – 5.30 p.m.)

#### Pre-qualification

basic knowledge of using Microsoft Powerpoint

#### Languages

German, English



# We are proud of our customer base





# Personal Notes



"With the support of CSK, we were able to produce the best proposal for a long time. The structured method helped us to develop the right strategy, to formulate convincing key messages, to present the content properly, and to submit a top-class proposal document."

Kurt Fischbacher, Sales Manager Large Accounts, Xerox AG, Zürich-Kloten



"The approach was professional, logical and effective, and the result was excellent. I can confirm our perfect satisfaction with the commitment and the output!"

Stephan Schüpbach, COO, Ascom Network Integration, Ascom AG



"CSK's contribution to produce the two world-class bids was extraordinary, both in terms of the bid preparation procedures and work control and in terms of the quality of the final result. This work, prepared in a very short time frame, led to the award of two FWA licenses. CSK clearly have exceeded our expectations"

Leandro Fernandes, G9 SA Telecomunicações SA., Portugal



"Our proposals have improved drastically."

Martin Brunner, Client Service Principal, Global Services, IBM (Schweiz) AG



"CSK BidMaster is the most efficient and best structured method to increase the probability to win bids irrespective of the industry or complexity of the bid"

Brian Rüeger, COO, bmd wireless AG, Zug



„Very practical. I have learned to identify the client's needs and to transform our answers into messages“ „The workshop was indeed very interesting and gave me inspirations for our proposals.“

Hans Gath, BU head, and Lars Voges, Product Manager, M+W Zander Products Ltd.



"Very good experience. Very pragmatic."

Lorenzo Andreani, Head of Bid Management, Swisscom Solutions AG



**Bid Alliance**

*CSK is a proud member of the Bid Alliance*



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