CSK
Proposal Management and B2B Sales Training

Programme 2016 v1.0
Course Overview

Class-room Training:

- **B1A. General BidMaster™ “Standard” (3 days)**
  - comprehensive training for all bid/proposal team members, including proposal presentation and negotiation

- **B1B. General BidMaster™ “Compact” (2 days)**
  - comprehensive training for all bid/proposal team members

- **B2A. Storyline Workshop “Standard” (2 days)**
  - develop a winning proposal strategy and a convincing storyline

- **B2B. Storyline Workshop “Compact” (1 day)**
  - develop a winning proposal strategy and a convincing storyline

- **B3. Risk Management within the bid/proposal process (1 day)**
  - how to deal with chances and risks

- **B4. Pricing and Value Creation (1 day)**
  - understand pricing mechanics, and develop the “right” price

- **B5. Complex Proposal Management (1 day)**
  - efficient project management in large or complex proposals

- **B6. Proposal Production (1 day)**
  - all about the physical production of the proposal document

- **B7. Writing Convincing Executive Summaries (1 day)**
  - all about the most important part of your proposal document

- **C1. The Bid Presentation (1 day)**
  - the successful proposal presentation

- **C2. Negotiation Training (1 day)**
  - the final phase

- **D1. APMP Certification Training (1 day)**
  - specific preparation for the APMP Foundation Level exam

eLearning:

- **APMP Foundation-Level Prep Course (English)**
- **Creating Winning Stories (English)**
- **Writing Convincing Executive Summaries (English)**
- **Powerful Proposal Presentations (English)**

- **individual, custom tailored training courses** (on request)
- **webinars, online trainings, eLearning** (see elearning.cskmanagement.com)
- **personal coaching** (on request)
- **business development and sales trainings** (please ask for our separate brochure)

The courses are designed for groups up to 20 participants. However, the ideal size is from 7 to 20 participants.
## CSK Proposal Management Training — The Concept

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

### “Maximum Practice — Minimum Theory”
CSK has developed the training courses based on the proven workshop concept: "Maximum Practice — Minimum Theory". During these interactive courses, participants are fully involved, receiving practical and structured feedback from the trainer and other participants. The concise theoretical sections provide participants with the practical instruments to assist them in their daily business.

### Duration and Dates
The training duration is between one and three days.

### Location
As the training courses are designed to be in-house seminars, they are held at your premises or at a seminar location of your choice. We will gladly assist you with the reservation. Some of the training courses are also held as public workshops.

### The Trainers
We only use experienced trainers with excellent track records. They are either experienced Consultants or Line Managers. We are happy to provide you with their CVs.

### Quality
Our quality is guaranteed. If the participants' average rating is lower than "good", our customers are free to decide if and how much they are willing to pay for the training course (expenses excluded).

### References
We provide top references on request.

### Tailor-made Training Courses
We can also provide a tailor-made training course according to your specific requirements. Please contact us.

### Languages
English, German. Other languages on request.
**Terms and Conditions**

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

Prices include:
- Hand-out copies and a course confirmation for each participant.
- A summary of the participants' feedback results to be sent to you.

Cancellation:

50% of the agreed price will be charged for short-term cancellations of less than one week before the start of the course.

Insurance:

Insurance is not included in the contract.

**Further Information and Booking**

If you have any further questions, we will be happy to answer them by phone, personally or by e-mail.

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

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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, Austria, UK, Finland, UAE, USA, and India.

CSK is an Approved Training Organisation (ATO) of APMP (Association of Proposal Management Professionals)
B1A/B. General BidMaster™
— comprehensive training for all bid/proposal team members

**Scope**

This 2- or 3-day training course is designed to set up 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 analysis to document production, from proposal office installation to proposal presentation.

Besides discussing key principles of proposal development, we go through the entire process using real-life examples. While doing this, we present (and practise) a number of tools and concepts that assist in developing winning proposals — checklists, templates and methodologies.
Content

- Pre-proposal activities (what can/must be done before the arrival of the RFP - Request for Proposal?)
- RFP analysis, the key principles of bidding, proposal strategy and proposal outline
- The Message Tree – the convincing storyline
- Structuring and formulation of proposal text (including the "Seven Golden 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
- Theoretical input and practical tools
- Exercises and real-life case examples
- Structured feedback from trainer and participants

Duration

B1A. General BidMaster™ “standard”: 3 days (~ 08.30 a.m. — 5.30 p.m.)
B1B. General BidMaster™ “compact”: 2 days (~ 08.30 a.m. — 5.30 p.m.)
(without proposal presentation and negotiation)

Pre-qualification

none

Languages

English, German
B2 A/B. The Storyline Workshop — develop a winning bid strategy and a convincing storyline

Scope

The success of a proposal depends on the right bid strategy and on the 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 what is called a Message Tree.

This course addresses proposal managers and other writers (such as subject matter experts), as well as salespeople who are involved in the proposal process.

Content

- Participants study the success factors of a winning proposal.
- Participants develop "Key Messages" and write a logical, convincing storyline using the concept of a Message Tree.
- Participants practise the formulation of a proposal text, using real examples to apply the "Seven Golden Style Guidelines".

Method

- Interactive workshop
- Theoretical input and practical tools
- Exercises and real-life case examples
- Qualified and structured feedback from trainer and participants

Duration

B2A. Storyline Workshop “standard”: 2 days (~ 08.30 a.m. — 5.30 p.m.)
B2B. Storyline Workshop “compact”: 1 day (~ 08.30 a.m. — 5.30 p.m.)
(without proposal presentation and writing executive summaries)

Pre-qualification

none

Languages

English, German
B3. Risk Management within the bid/proposal process — the right treatment of chances and risks

Scope

The appropriate handling of risks and chances within the bid/proposal process has a major impact on the margin of opportunity and the chances of winning a deal. It is therefore essential that the bid/proposal manager identifies all the chances, assesses them and develops strategies to reduce the negative financial impact on the opportunity.

On the basis of practical examples, the course teaches participants proven methods to identify risks and chances at an early stage. The use of the checklists and tools in our course assists participants to put into practice the theory they have learned.

The training course is designed for bid and proposal managers.

Content

- Participants study the most important risk categories in the bid/proposal process.
- Participants learn to identify risks and chances, their importance in the bid/proposal process and in the subsequent implementation of the project.
- Participants learn how to qualitatively and quantitatively assess risks and chances with the use of tools and methods and how to apply these systematically.
- Participants learn to develop risk strategies to avoid negative financial impacts on opportunities.

Method

- Interactive 1-day workshop
- Theoretical input and practical tools
- Exercises and real-life case examples
- Structured feedback from trainer and participants

Duration

1 day (~ 08.30 a.m. — 5.30 p.m.)

Pre-qualification

none

Languages

English, German
B4. Pricing and Value Creation
— understanding pricing mechanics and develop the „right“ price

**Scope**
The "right" price tag is one of the most difficult challenges in proposal development. This pricing workshop helps you to understand how customers view your price, which pricing strategies to apply and what elements you need to include in your price calculation.

**Content**
- How critical is the "right" price tag and how do customers perceive your pricing?
- Which types of pricing strategies should you use?
- What are the elements and methods to develop the pricing?
- Why are price and value often worlds apart?
- About value propositions and the price trap.

**Method**
- Interactive 1-day workshop
- Theoretical input and practical guidelines
- Exercises and real-life case examples
- Structured feedback from trainer and participants

**Duration**
1 day (~ 08.30 a.m. — 5.30 p.m.)

**Pre-qualification**
none

**Languages**
English, German
B5. Complex Proposal Production
— efficient project management in large or complex proposals

Scope
This 2-day training course is designed to help bid/proposal managers to manage large and complex proposal projects. It covers most of the topics of the General BidMaster course but it focuses far more on the aspect of project management. It covers the BidMaster™ Approach, containing many practical examples and exercises. The BidMaster™ Approach provides the methods, tools and structures to cover the entire proposal process, from RFP to document production, from proposal office installation to proposal presentation. Besides discussing the key principles of bidding, we go through the entire process using real-life examples. While doing this, we 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, as well as specific proposal management tools

Method
- Interactive 2-day workshop
- Theoretical input and practical tools
- Exercises and real-life case examples
- Structured feedback from trainer and participants

Duration
2 days (~ 08.30 a.m. — 5.30 p.m.)

Pre-qualification
none

Languages
English, German
B6. Proposal Production
— all about the physical production of the proposal document

Scope
This workshop is for Proposal Office Managers and Proposal Managers, and it covers all the areas dealing with the physical production of the bid/proposal document.

Content
- Set-up 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
- Theoretical input and practical tools
- Exercises and real-life case examples
- Structured feedback from trainer and participants

Duration
1 day (~ 08.30 a.m. — 5.30 p.m.)

Pre-qualification
none

Languages
English, German
B7. Writing Convincing Executive Summaries
— all about the most important part of your proposal

Scope
This is workshop is for all those who regularly write executive summaries. It provides you with the know-how and useful tools for writing convincing executive summaries.

Content
- Goal of the executive summary
- The ideal length
- The readers and their needs
- The authors
- The timeline
- The 5-box structure
- Quality check for executive summaries

Method
- Interactive 1-day workshop
- Theoretical input 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
none

Languages
English, German
C1. The Proposal Presentation — the successful presentation of the proposal

Scope

It is not all over yet at the submission of the document: the proposal presentation often decides between win or loss. This workshop gives you the tools and methods to develop a well-structured, convincing and easy-to-understand proposal presentation, ensuring that the customer receives the right message.

Content

- Structure and content of a successful proposal presentation
- The correct layout/structure of PowerPoint slides
- Key success factors in 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 (optional)
- Theoretical input and practical tools
- Exercises and real-life case examples
- Structured feedback from trainer and participants

Duration

1 day (~ 08.30 a.m. — 5.30 p.m.)

Pre-qualification

none

Languages

German, English
C2. 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 intelligent preparation, as well as your professional discussion leadership. This training session covers all these issues.

Content

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

Method

- Interactive 1-day workshop
- Video training
- Theoretical input and practical tools
- Exercises and real-life case examples
- Structured feedback from trainer and participants

Duration

1 day (~ 08.30 a.m. — 5.30 p.m.)

Pre-qualification

none

Languages

English, German
D1. APMP Certification Training — specific preparation for the APMP Foundation Level exam

Scope
This training course prepares experienced bid managers for the APMP Foundation Level examination.
After this course, the bid manager will be in a position to pass the demanding APMP Foundation Level examination (in a trial on-line multiple-choice test).
More information on the APMP Certification Programme can be found on http://www.apmp.org/?page=AccreditationProgram

Content
- Introduction to the basics of Bid Management according to the APMP syllabus
- Specific APMP terminology (syllabus) and focus of the APMP examination
- Methodical preparation for the examination procedure and hints for a successful APMP certification

Method
- Interactive workshop
- Theoretical input according to APMP Syllabus
- Exercises and discussion rounds
- Structured feedback from trainer and participants
- Sample questions

Duration
1—1.5 days (~ 08.30 a.m. — 5.30 p.m.) (depending on the participants’ language skills)

Pre-qualification
- for the APMP Certification: 1-year experience in a bid environment
- APMP membership is not mandatory, but recommended

Language
English (to date, APMP offers the certification examination in English only), German
CSK eLearning Academy: Flexible learning without travel time and without travel cost

CSK provides a wide range of distance learning options, including eLearning, webcasts and webinars.

Please check our training and event calendar, too: www.cskmanagement.com.

**CSK eLearning**

Our interactive eLearning modules are the most flexible option to learn. CSK eLearning modules work on all Windows PCs, Macs and iPads, and Android Tablets.

After registration, you have access to the course for 180 days.

The option pack includes all shown slides as a printable PDF file.

**CSK WebCasts und Webinare**

To combine the cost benefit of a typical web-based solution with the advantages of an on-site training, CSK offers a series of Webinar modules with a high level of interaction with a real trainer.

As opposed to other typical online training concepts, CSK provides interactive access to a real trainer delivered over the web. This means learners can resolve issues in real time and comprehension and retention is increased. To compensate with the potential disadvantage of the fact that you might not be able to attend the session, we record all webinars for you so that you still have access to the same content, too.

Our WebCasts are performed on CSK's WebEx platform.

After your online registration and the receipt of your payment, we will send you an email with a link to CSK's WebEx platform and the webinar agenda. Additionally, we will send you the password to access the webinar platform.
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<th>eLearning Module</th>
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| APMP Foundation-Level Prep Course (English)          | 3 to 6 hours | - EUR 220/USD 295 for APMP members  
- EUR 370/USD 465 for non-members  
- Price incl. Option Pack (PDF and 75 additional online Sample Questions) |
| Creating Winning Stories (English)                   | 1 to 3 hours | - EUR 69 / USD 75 for APMP members  
- EUR 89 / USD 99 for non-members  
- Option Pack: EUR 10 / USD 10 (PDF) |
| Writing Convincing Executive Summaries (English)     | 30 - 60 minutes | - EUR 59 / USD 65 for APMP members  
- EUR 79 / USD 89 for non-members  
- Option Pack: EUR 10 USD 10 (PDF) |
| Powerful Proposal Presentations (English)            | 30 - 60 minutes | - EUR 59 / USD 65 for APMP members  
- EUR 79 / USD 89 for non-members  
- Option Pack: EUR 10 USD 10 (PDF) |

You can register CSK eLearning modules in our online store: [https://www.cskmanagement.com/en/online-store](https://www.cskmanagement.com/en/online-store)

Please ask us for volume discounts or bundle prices.
We are proud of our customers
"With the support of CSK, we were able to produce our 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 producing 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 timeframe, led to the award of two FWA licences. 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 of winning 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 inspiration 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
CSK is an Approved Training Organisation (ATO) of APMP (Association of Proposal Management Professionals)