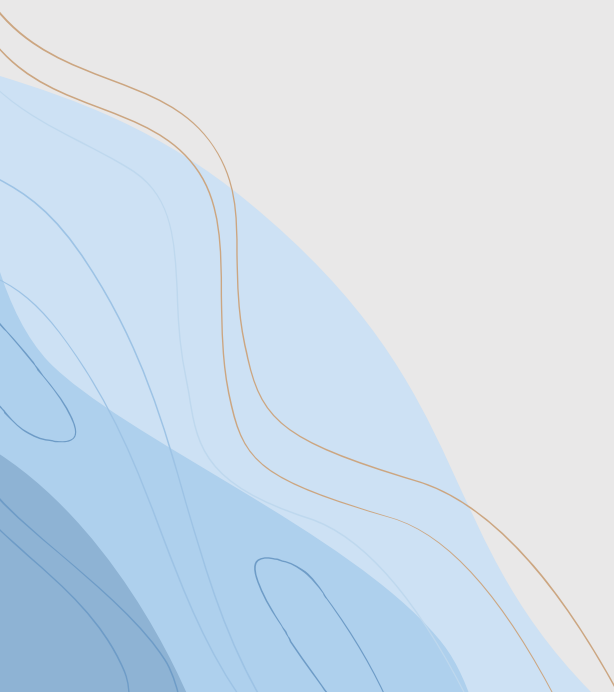




APMP California Capture Adventure

How does it begin?



Welcome!

Thanks for being part of the adventure!



Marie
APMP Professional
Development Chair



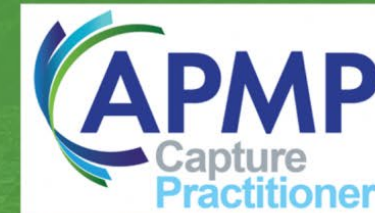
Heather
APMP California Chapter Chair

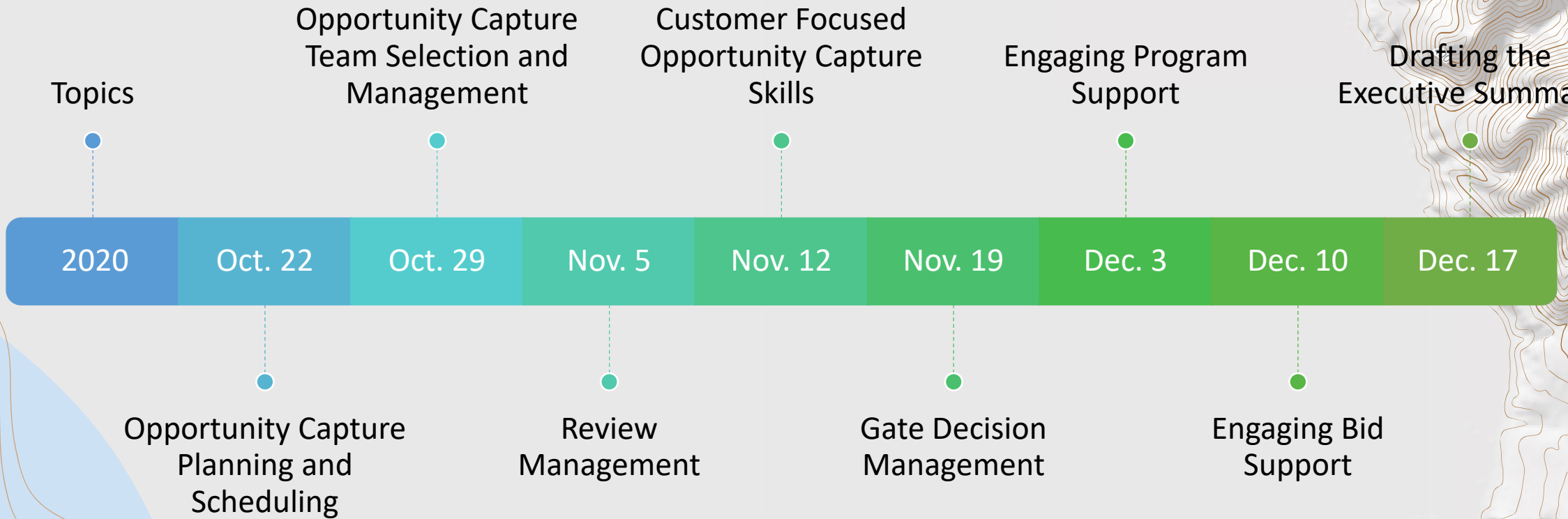


APMP CALIFORNIA CAPTURE ADVENTURE SERIES

EVERY THURSDAY ON ZOOM | 9:30 - 10 AM
OCT. 22 - FEB. 25

JOIN US FOR A WEEKLY 30-MINUTE
POWER HALF-HOUR TO PREPARE FOR THE
APMP CAPTURE PRACTITIONER CERTIFICATION!







APMP California Capture Adventure Guidelines

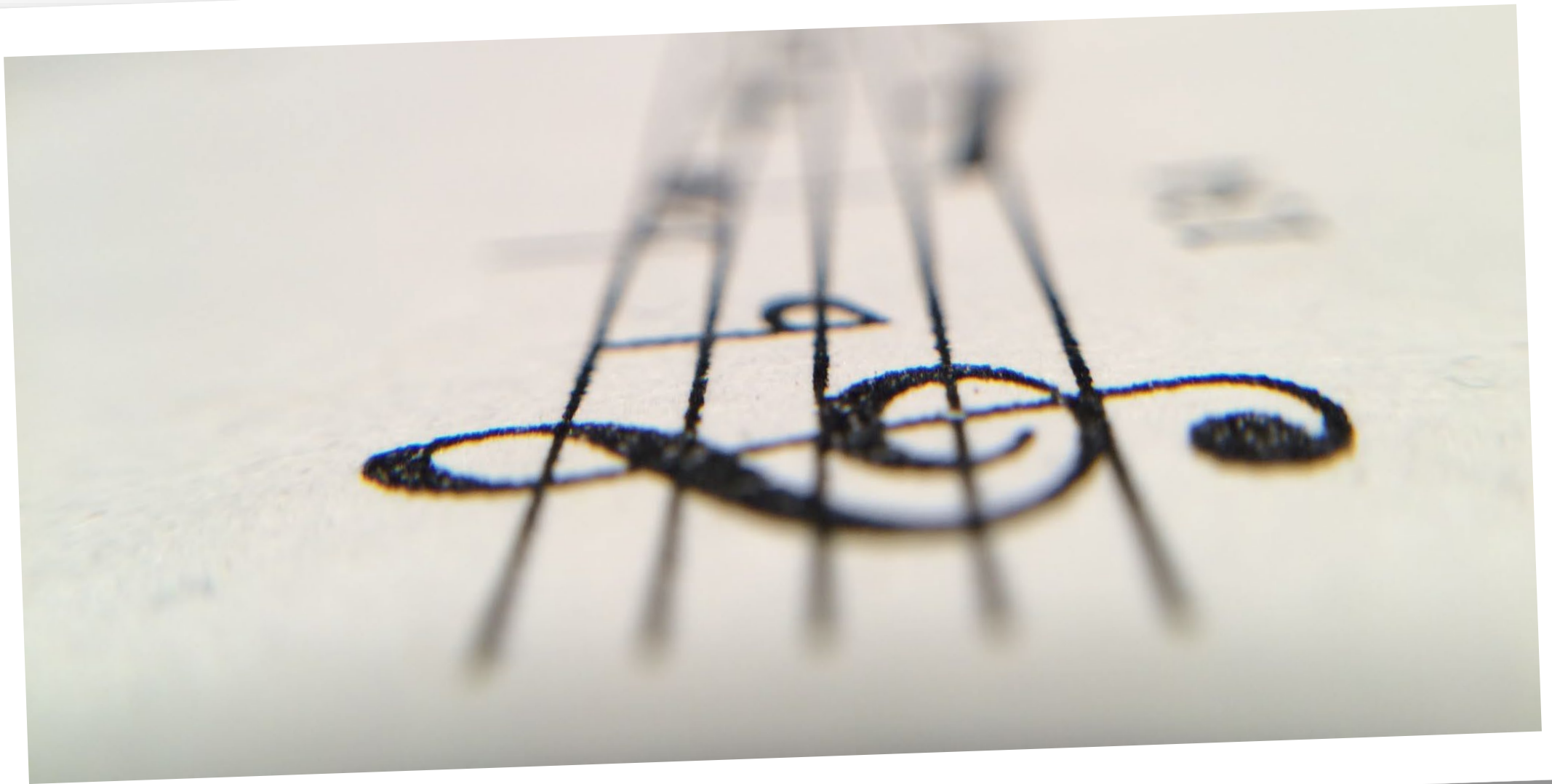
Introduction

APMP Certification

Exam Information

How to prepare for the exam

Getting Training

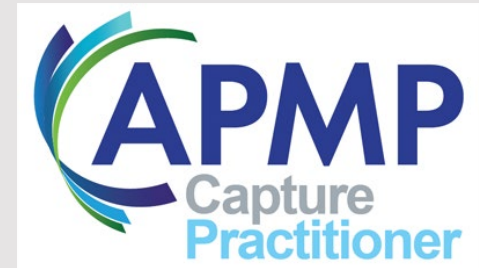




Proposal professionals with 7 or more years' experience



Proposal professionals with 3 to 7 years' experience



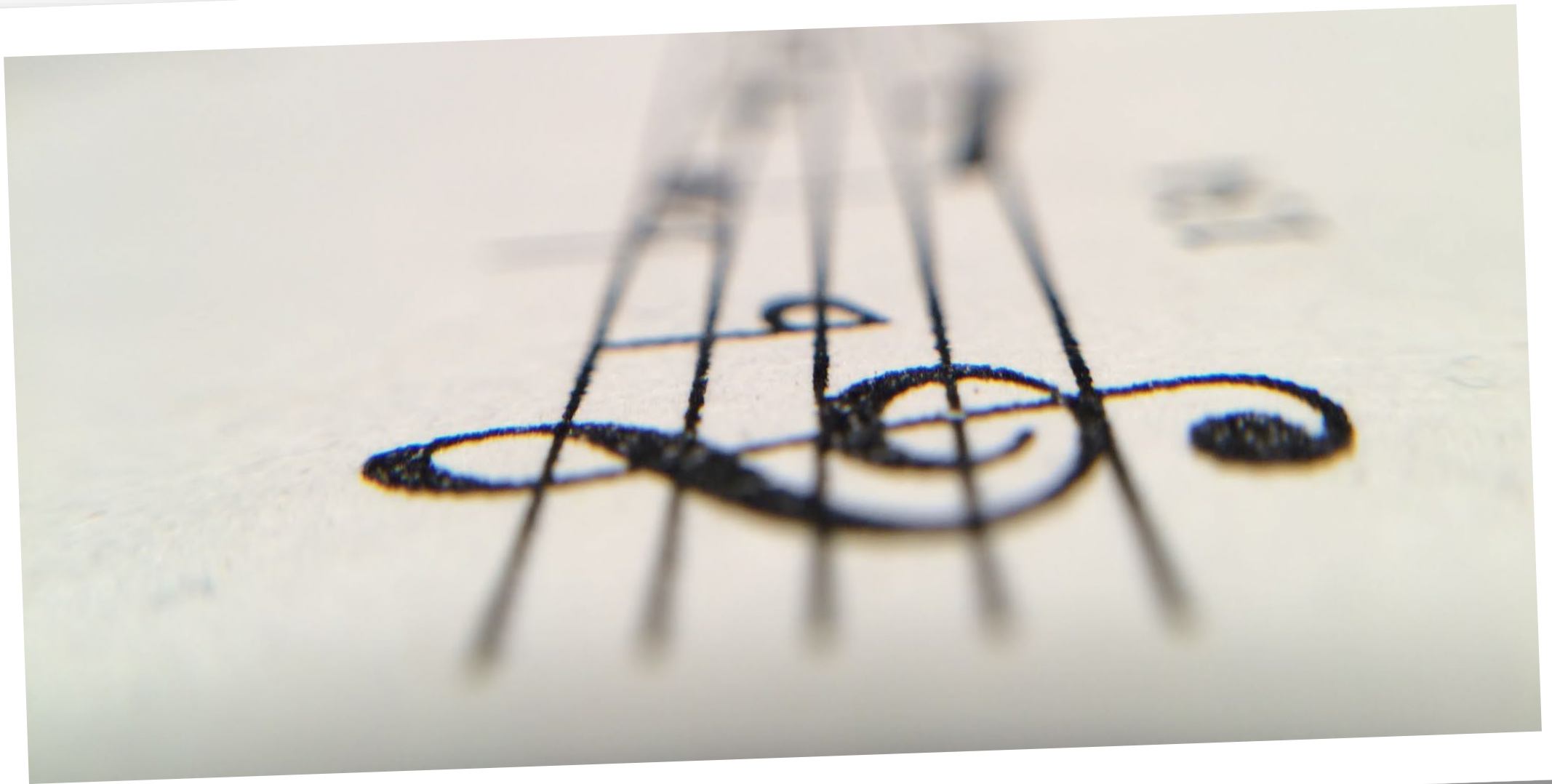
Proposal professionals with 1 to 3 years' experience

APMP CAPTURE PRACTITIONER CERTIFICATION

<https://www.apmp.org/page/CapturePractitioner>

APPROVED TRAINING ORGANIZATIONS

<https://www.apmp.org/page/AccreditationATOs>



An aerial photograph of a large body of water, possibly a reservoir or a wide river, with a bright sun reflecting on the surface. The water is dark blue and grey, with some lighter patches where the sun's reflection is visible. The sky is a pale, hazy blue.

Opportunity Capture Planning and Scheduling

Opportunity Capture Planning and Scheduling

1

Demonstrate knowledge of an opportunity capture plan discipline to capture new business more efficiently

2

Develop structured opportunity capture plans that include external analysis, internal analysis, strategy development, and execution and monitoring

3

Use an appropriate medium to develop; review, share, and update opportunity capture plans.

Opportunity Capture Planning and Scheduling

4

Maintain an opportunity capture process that is dynamic, flexible, interactive and current

5

Develop a schedule of opportunity capture activities using scheduling tools. (Scheduling)

6

Plan regular decision gate reviews to determine whether to advance the opportunity capture to the next phase or end the pursuit (Gate Decisions)

Opportunity Capture Planning and Scheduling

7

Schedule reviews to improve the opportunity capture plan, strategy, proposal, or lessons learned (Reviews)

8

Use the opportunity capture plan outputs to begin the proposal planning process (Linking opportunity plans to proposal content)

9

Demonstrate knowledge of an opportunity capture plan discipline to capture new business more efficiently

Opportunity Capture Planning and Scheduling

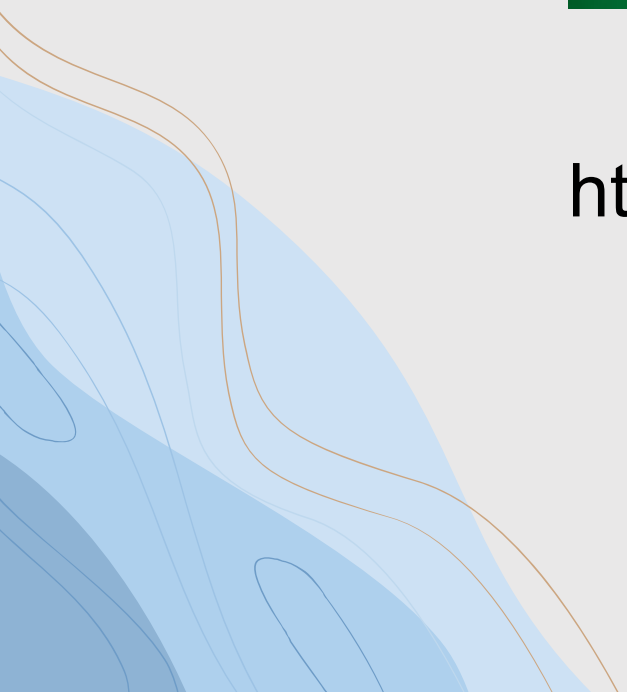
10

Create, align and adapt the opportunity capture schedule to match, the customers actions, the organization's business development process, the resources available, and the selling environment (End to End Process and Scheduling)



 **APMP Body of Knowledge**

<https://www.apmp.org/page/BOK>



Opportunity Capture Planning and Scheduling BOK Topics



Opportunity
Capture
Planning and
Scheduling



Gate Decisions



Reviews



Linking
opportunity
capture plans to
Proposal
Content



End to End
Process

Opportunity Capture Planning and Scheduling BOK Topics

<http://bok.apmp.org/bok/opportunity-plans/>

<http://bok.apmp.org/bok/scheduling/>

<http://bok.apmp.org/bok/gate-decisions/>

<http://bok.apmp.org/bok/review-management/>

<http://bok.apmp.org/bok/linking-opportunity-plans-to-proposal-content/>

<http://bok.apmp.org/bok/end-to-end-process/>



Topics

Opportunity/Capture and Proposal Management Planning

<http://bok.apmp.org/bok/opportunity-plans/>

Summary

- Use opportunity/capture plans to document your work, inform your organization, and facilitate reviews.
- Tailor and scale opportunity/capture plans to match the opportunity.
- Endeavor to gather information collaboratively with the customer.
- Endeavor to gather information on your competitors and their likely solutions and to monitor what changes.
- An early draft of the executive summary is a key element of a good capture plan because it serves as a valuable aid in the transition between opportunity/capture planning to proposal planning and should be used to brief the proposal kickoff team.
- Start early; front-loading proposal planning can give you more time to develop a winning proposal.
- Remember to do the work, not just “fill out” the opportunity/capture plan. This means working closely with customers to understand their needs.
- Keep completed opportunity/capture plans for reference and reuse on future deals.

Terms to Know

- [Bid/No-Bid Decision](#)
- [Bidder Comparison Matrix](#)
- [Competitor Review](#)
- [Customer-Focused Writing](#)
- [Customer Positioning](#)
- [Executive Summary](#)
- [Hot Buttons](#)
- [Opportunity/Capture Plan](#)
- [Opportunity/Capture Plan Review](#)
- [SWOT](#)
- [Win strategy](#)



Topics

Opportunity/Capture and Proposal Management Scheduling

<http://bok.apmp.org/bok/scheduling/>

Summary

- **Even if everything else is functioning, scheduling mistakes can threaten quality, compliance, and on-time delivery of a proposal.**
- **Base the schedule on metrics collected from previous proposals and make a single person accountable for completion of each task.**
- **Use interim deadlines to keep tasks on track and provide feedback early.**
- **Look for tasks that are independent of one another that can be completed in parallel. Carefully plan tasks that have multiple dependencies.**
- **Leave enough leeway in schedules for time off on weekends and holidays, multiple review cycles, and potential RFP changes, as well as for unexpected setbacks.**

Terms to Know

- [Project Schedule](#)
- [Proposal Management](#)
- [Proposal Resource Schedule](#)



Topics

Gate Decisions

<http://bok.apmp.org/bok/gate-decisions/>

Summary

- **Use gate decisions to control progression through business development phases.**
- **Include relevant roles and limit nonessential participants at gate decisions.**
- **Hold gate decision with the right level of senior management involvement.**
- **Plan decision gates carefully.**
- **Specify inputs and outputs for each gate decision.**
- **Avoid overfocus on the technical solution.**



Topics

Gate Decisions

<http://bok.apmp.org/bok/gate-decisions/>

Summary continued

- **Continue the gate decision until management reaches a firm decision.**
- **Be prepared to end the pursuit.**
- **Eliminate personal opinion, bias, and ego.**
- **Record the decision, update the opportunity/capture plan, archive the information, and document lessons learned.**
- **Gate decisions are a key component of the business development lifecycle.**
- **Gate decisions prevent businesses from unnecessarily expending resources on bid they have a low probability of winning.**
- **Consistent decision criteria can help organizations make decisions effectively.**
- **Two important criteria are probability of win and probability of go, or the likelihood that a customer will actually proceed with a funded program upon making an award decision.**

Terms to Know

- Bid Decisions
- Probability of Go
- Probability of Win
- Win Rate



Topics

Reviews

<http://bok.apmp.org/bok/review-management/>

Summary

- **Reviews should be scheduled appropriately to allow sufficient time for proposal team members to incorporate reviewers' comments.**
- **All reviews should have an experienced leader who understands the customer and can keep team members on track.**
- **Organizations should keep the same core team throughout all functional reviews, adding team members with subject matter expertise as needed.**
- **Most reviews are associated with confirming the bid decisions. Reviews should be organized around desired outcomes and should improve the quality of your bid.**
- **Reviews can be adapted for any bid circumstance. Remember: It is more important to consider and deliver on the principles of the appropriate bid reviews than to be constrained by the review delivery mechanism.**



Terms to Know

- [Functional Reviews](#)
- [Review Team Lead](#)
- [Subreviews](#)



Topics

Linking Opportunity/Capture Plans to Proposal Content

<http://bok.apmp.org/bok/linking-opportunity-plans-to-proposal-content/>

Summary

- To best apply opportunity/capture plans to proposal content, develop key intelligence and analysis using consistent and reusable tools, templates and formats, such as a key information summary sheet
- Appoint a key proposal team member to take responsibility for updating the opportunity/capture plan and ensuring that its contents are applied to the proposal
- Ensure that functional reviews support the higher-level aim of expressing key ideas, rather than focusing on detail

Terms to Know

- [Competitive Intelligence \(CI\)](#)
- [Opportunity/Capture Plan](#)
- [Value Proposition](#)
- [Win strategy](#)
- [Win Themes](#)



Topics

End to End Process

<http://bok.apmp.org/bok/end-to-end-process/>

Summary

- A defined end-to-end BD process is critical to achieving high levels of BD capability. It comprises a series of phases, decisions, reviews, and outputs.
- The generic end-to-end process introduces the principles and best practices common across selling environments.
- Organizations must develop tailored end-to-end processes that best support their company and their customers.
- For an end-to-end BD process to be successful, a proactive change-management plan must support its implementation.

Terms to Know

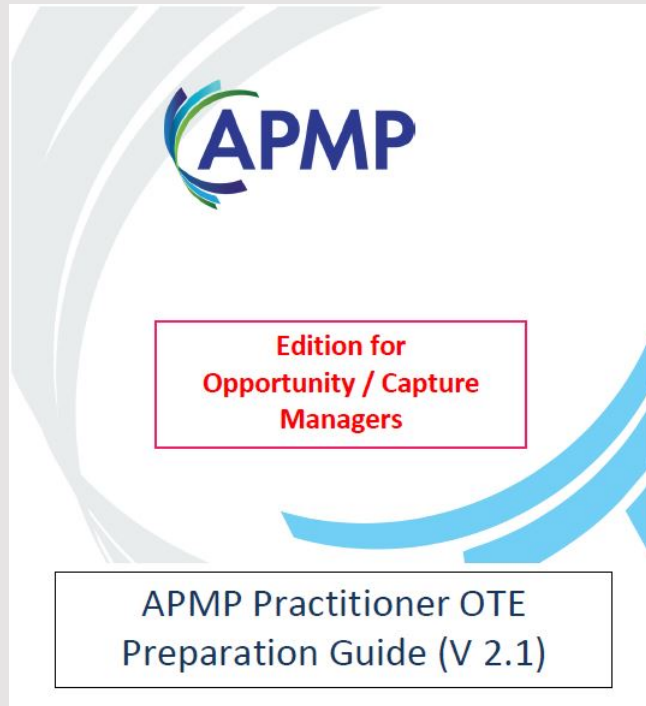
- [Best and Final Offer \(BAFO\)](#)
- [Bid Decisions \(General\)](#)
- [Bid/No-Bid Decision](#)
- [Bid Pursuit Decision](#)
- [Bid Validation Decision](#)
- [Business Case Review/Senior Management Review](#)
- [Business Development Phases](#)
- [Competitive Intelligence](#)
- [Competitor Review](#)
- [Content Plan](#)
- [Delivery](#)
- [Executive Summary](#)
- [Final Document Review](#)
- [Job Role \(Relationship of Roles to Job Titles\)](#)
- [Lessons Learned Review](#)
- [Market Identification](#)
- [Market Strategy](#)
- [Opportunity/Capture Plan](#)
- [Opportunity/Capture Plan Review](#)
- [Opportunity Qualification Decision](#)
- [Pricing Strategy](#)
- [Proposal](#)
- [Proposal Development](#)
- [Proposal Outline](#)
- [Proposal Planning](#)
- [Proposal Responsibility Matrix](#)
- [Proposal Management Plan](#)
- [Response Matrix](#)
- [Reviews \(General\)](#)
- [Style Sheet](#)




APMP California Capture Adventure

What can you take away?

Take Aways



[https://www.apmp.org/resource/resmgr/certification/APMP Opportunity & Capture P.pdf](https://www.apmp.org/resource/resmgr/certification/APMP_Opportunity_&_Capture_P.pdf)



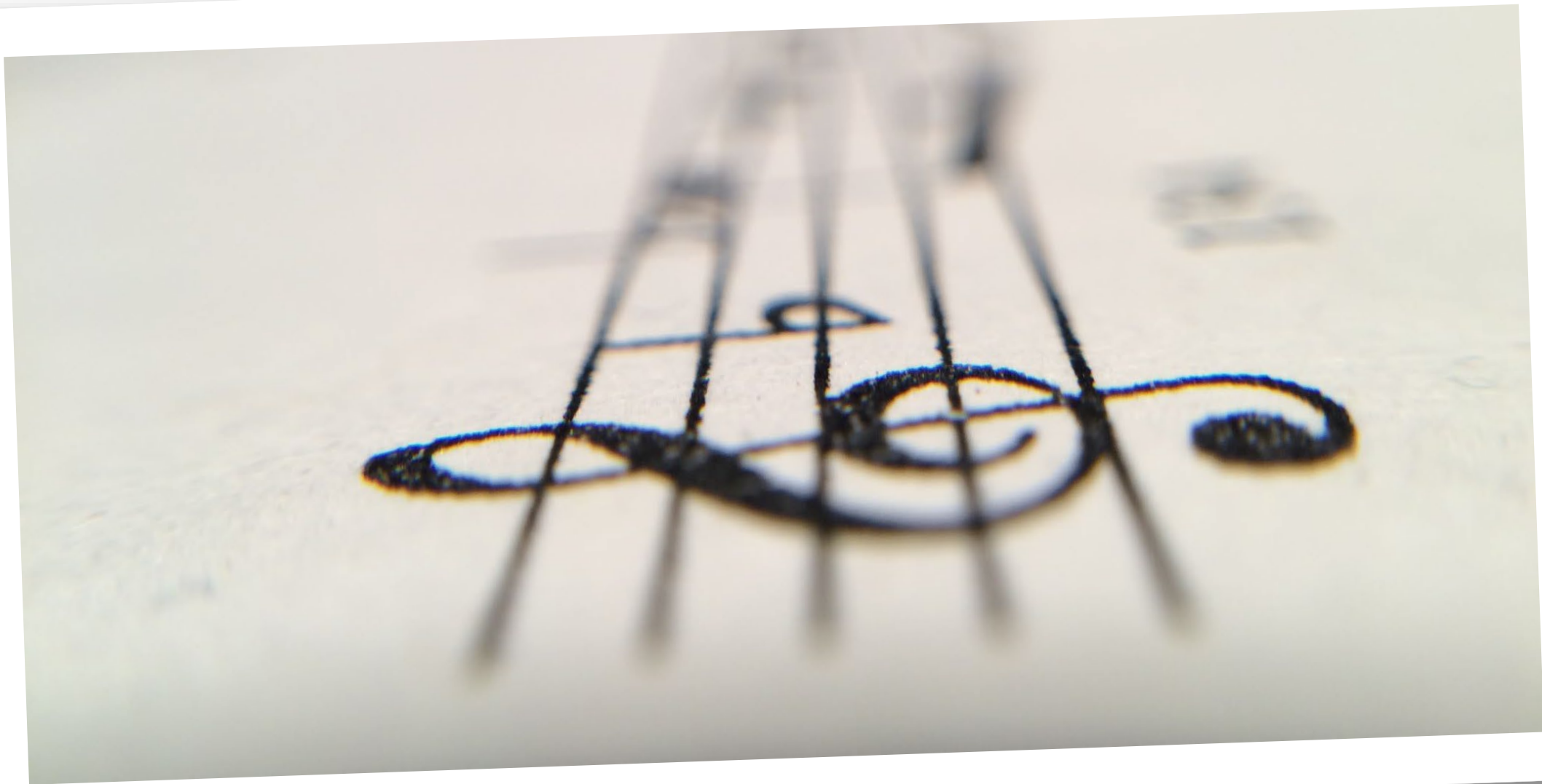
Appendix B - APMP Industry Glossary of Terms (Version 6)

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
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An aerial photograph of a coastline at sunset. The sun is low on the horizon, creating a bright glow and casting long shadows across the water. The text "Can you capture every moment?" is overlaid in white, centered on the image.

Can you capture every
moment?



CAPTURE AND BUSINESS DEVELOPMENT CONFERENCE

JANUARY 28, 2021 | ONLINE



CBDC 2021 SESSION CROWDSOURCING



What sessions do YOU want to see at CBDC 2021?

We're asking our members to lead and inform the programming at APMP's 2021 Capture & Bid Development Conference. Please add your ideas below for two tracks: Capture and Business Development.

Suggest the most appropriate education track for this session: *

- Capture
- Business Development

Suggest a plain-language title, in five-to-seven words *

Write a one-sentence abstract - a concise description of the session *

250 of 250 characters remaining

Virtual Events Calendar

APMP Community Calendar

https://www.apmp.org/events/event_list.asp

APMP Webinars & Recordings

<https://www.apmp.org/page/APMPOnDemandStore>



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