Proposal Training:
A Survey of Current Practice and
a Look at the Future of e-Learning

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Proposal Training:
A Survey of Current Practice and
a Look at the Future of e-Learning

- Trends in Training   Dave Camp
- APMP-SoCal Training Survey   Dave Camp
- UCLA On-Line Training   Jeff Longshaw
- Suggestions for e-Learning   Jeff Longshaw
- Discussion/ Q&A

Trends in Training

- **<u>Management's love-hate relationship with training</u>**
    - Billions spent annually, often seen as a miracle cure, but
    - In tough times, training is the first area cut back!

- **<u>Behavior change and retention of information hard to quantify</u>**
    - Donald Kirkpatrick's Four Levels
        - Reaction: "Did they like it?"
        - Learning: "Did they get it?"
        - Behavior: "Do they apply it back on the job?"
        - Results: "Does it really make a difference?"
    - More emphasis on measuring return on investment*

- **<u>Rise of the "Chief Learning Officer"</u>**
    - Goal is to integrate learning into the enterprise (at a profit)

* <u>Return on Investment in Training and Performance Improvement Programs</u>, 2nd. Ed., 2003, Jack J. Phillips, PhD

The Rise of e-Learning

- <u>1994-2004: Declining support for classroom-based, multi-day offsite workshops and training</u>
    - Downsizing, workloads, time-starved employees, training expense
- <u>Web-based e-learning replaces earlier computer based training</u>
    - Web browsers with Flash and other multimedia offer universal access
    - WebEx, Breeze, Blackboard and other collaboration software provide communication and interaction
    - Synchronous vs. asynchronous learning
- <u>Management overreacts, e-learning oversold</u>
    - All training at your computer!
    - Reusable learning modules
    - "Death by PowerPoint!"
- <u>Great e-Learning costs $10K per hour to develop</u>

Allen Interactions
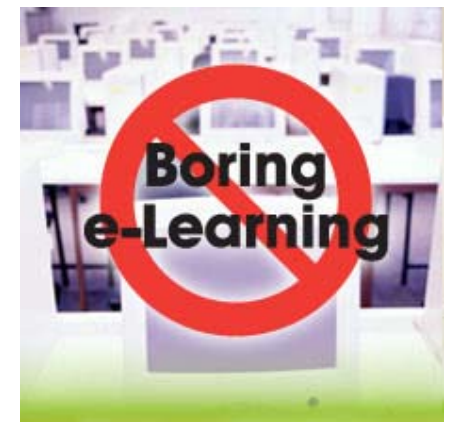
Proposal Training: 2004 Survey of APMP-SoCal Members

- Are these industry trends impacting our business? What is the state of proposal training? Will e-learning play a role?
- First survey of members in APMP
    - 12 thoughtful and thorough responses
    - Good cross-section of industries and companies
- <u>Thanks for your help!</u>

Survey Summary

- <u>Most have taken formal proposal training (Shipley, Hy Silver, SM&A)</u>
  - Response generally positive
- <u>Everyone believes training is valuable</u>
- <u>Classroom venue is overwhelming favorite</u>
  - Very few had e-learning experience, but most response was negative
  - "E-learning lacks interaction", "can't find the time to do it"
- <u>Training should use a real RFP when possible</u>
- <u>Just-in-time training is great, but can interfere with the proposal</u>
- <u>Training of capture managers and proposal managers is a priority</u>

- 1. What proposal training have you received?

- Shipley, Hy Silver, SM&A

- On-the-job

- APMP conferences

- In-house courses

- All training is based on a process manual

- 2. Does your company provide formal training, either classroom, on-line, or offsite public training?

- Classroom and public training- 75% yes

- But 25% had no formal training

- 3. What training is needed for current proposal teams?
- 4. Should training be in classrooms, JIT in proposal centers, on-line, or just mentoring?

- Key is "leading teams", not just "managing teams"
- JIT can lead to too much stress
- Strategy and capture should not be JIT
- Hands-on, interactive!

- 5. What about capture strategy training?

- Should be emphasized
- Needs classroom
- Particularly for proposal leadership
- Detailed exercise or scenario works best
- "Yes!"

- 6. Training in-house or vendors?
- 7. Both entry level and advanced?
- 8. Focused training with real RFP or generic RFP?

- Shipley most popular vendor
- SM&A clients get specialized training
- Generally, both entry level and advanced provided
- Real RFP preferred

- 9. Classroom training, e-learning, or blended approach?

- Classroom favorite venue

- Most had no experience with e-learning

- Blended has appeal, if elements of classroom training can be brought to the desktop

- 10. If you have taken an on-line course, what was your experience?

- 7 had no experience
- 5 had experience, but were lukewarm
- "Not as effective as classroom training and not as long-lasting, but better than nothing."

- 11. Do provide training on use of proposal tools? MS Word?

- 12. Do you provide CD-ROMs, on-line tools, or books for training?

- Most companies have some on-line tools, but not all

- Most have some MS Word training available, but not all

- Tying tools into the training experience was seen as promising

- 13. What do you think is the future of proposal training?

- "Companies not providing enough budget…"
- "There will always be a need…"
- "More tools training and on-line tools"
- "…to not train will cost more in the end"
- "Do it better the 1st time!"
- "Essential!"

My 2 Cents

- Management emphasis on budgets and ROI a reality
  - Week-long offsites increasingly rare
- Integrating classroom with e-learning may work
  - Blended solutions take tools back to the workplace
- It may be easier to make the case for proposal training
  - Poorly trained teams usually lose!
- We need to learn how to make e-learning work!

Allen Interactions