



Shipleley Proposal Guide™

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This Proposal Guide has three aims: 1) Help individuals and organizations win competitive business more effectively, efficiently, and consistently; 2) Offer clear guidance to business development professionals that is practical and easy to find and; 3) Record best-practice guidelines.

Help individuals and organizations win competitive business more effectively, efficiently, and consistently.

Guidelines in each entry are based upon the fundamental principles of our consulting practice:

- Align your proposal with the customer's evaluation process.
- Use a disciplined business development process that emphasizes up-front planning.
- Schedule to the process and maintain schedule discipline.
- Base your strategy on the customer's perspective.
- Focus your effort early and throughout with an early executive summary.
- Apply proven project management principles to proposal development.
- Use a disciplined, customer-focused writing approach.
- Use reviews to both control and add value to the process.

Organizations implementing these principles, supported by the guidelines in this *Proposal Guide*, will capture more business at a lower cost.

Offer clear guidance to business development professionals that is practical and easy to find.

The concept for the *Proposal Guide* originated when individuals in client organizations repeatedly asked similar questions:

Is this written down anywhere? Now it is.

Most training for sales professionals focuses on enhancing sales skills and explaining the features and advantages of their organization's products and services, but not on how to direct, prepare, or contribute to proposals. This is the first easy-to-use reference for business development professionals who are seeking practical, clear guidance on how to win competitive business in all markets, large or small, domestic or international, private sector or public. In addition, the *Proposal Guide* was selected in 2005 as the primary reference for the Association of Proposal Management Professionals (APMP) Foundation Level certification exam.

Record best-practice guidelines.

At Shipley Associates, we have observed and recommended industry best practices in business development training, consulting, and process reengineering since 1972. We endeavor to follow these principles in our consulting practice, teach them in our training practice, and share them in this *Proposal Guide*.

This *Proposal Guide*, like the companion *Capture Guide* and *Business Development Lifecycle Guide*, offers guidelines, not rules. Reality encompasses more shades of gray than can be covered in a guide intended to be concise. When in doubt, do what the customer says and be consistent.

Are the guidelines unique? Not usually.

Can you find all of these guidelines in any other reference? No.

What's New In the Fourth Edition

To reflect primarily changes in technology, 4 topic sections were updated: ELECTRONIC SUBMITTAL, PRODUCTION, PROPOSAL MANAGEMENT PLAN, and PROPOSAL PREPARATION TOOLS.

The following 6 topic sections were shortened and refocused on the proposal manager's role: BID DECISIONS, CAPTURE PLANNING, EXECUTIVE SUMMARY, PROCESS, PROPOSAL STRATEGY, and REVIEWS. BID DECISIONS are addressed more specifically in the *Capture Guide* in DECISION GATE REVIEWS.

The following topic sections were moved to the *Capture Guide* because they are most directly relevant to the capture manager's role: BD-CMM, PERFORMANCE BASED ACQUISITION, PERSUASION, PRESENTATIONS TO CUSTOMERS, PRICING TO WIN, TEAMING, and VALUE PROPOSITION. PRICING was refocused and re-named COSTING and also moved to the *Capture Guide*.

The 5 model documents focused on various types of sales letters were also moved to the *Capture Guide* as most relevant to the capture manager or sales role. The 3 executive summary model documents are included in both *Guides*, as both the capture manager and proposal manager have key development roles. A fourth model document illustrating how a value proposition is incorporated in an executive summary was added to both *Proposal* and *Capture Guides*.

The Shipley *Proposal Guide*, *Capture Guide*, and *Lifecycle Guide* are now extensively cross-referenced and integrated. We hope you will find this refocused and updated Fourth Edition to be an even more valuable tool that helps you and your organization win competitive business more effectively, efficiently, and consistently.

Proposal Guidelines are designed and written to help business development professionals answer routine questions about how to win competitive business more effectively, efficiently, and consistently.

Readers seeking a broad overview of the business development process should review the *Shipley Business Development Lifecycle Guide* and additional process books.

Many of the guidelines involve the preparation of written documents, especially sales proposals. The alphabetical arrangement of the entries allows business development professionals to answer questions easily and rapidly. Numerous examples and suggestions gleaned from industry best practices make the guidelines practical and applicable to real-world competitions.

For new users of the *Proposal Guide*, consider the following time-saving suggestions:

- Use the alphabetical arrangement to find a specific topic. You may have to try several titles before you find the information you want. If you cannot find a topic, refer to the Index.
- After you have found the relevant entry, review the short summary and the numbered guidelines in the shaded box at the beginning of the entry. Then turn to the guideline that appears to answer your question.
- Read the guideline and following text. Be sure to review the examples to help clarify the guideline. Because individual prospects and competitions are unique, the guidelines are only suggestions rather than rules or legal requirements.
- Consider the context of the guideline and accompanying examples. Check to see if any notes, beginning with the word **NOTE**, add additional information about options or exceptions to the guideline.

- Turn to the cross-referenced entries if you still have questions. Cross-references have this format: *See ACTION CAPTIONS*. Entries in other *guides* include the name of the guide.
- Refer to the *Lifecycle Guide* to clarify how topics integrate with the *Shipley 96-step Business Development Process*.
- If your question involves preparing a document, check the **MODEL DOCUMENTS** section of the *Proposal Guide* for additional applications of the guideline.

The model documents illustrate best practices in business development and current American business English. All documents follow the guidelines as closely as possible, subject to unique aspects of the specific competition.

Different individuals, organizations, market sectors, and countries use similar and potentially confusing terms. The following terms are used in this *Guide*:

- Bid request vs. RFP, RFT, RFQ, ITT, or solicitation
- Commercial vs. nongovernment or private sector (Not meaning cost or terms and conditions).
- Customer vs. prospect, prospective customer, buyer, prospective buyer, or client.
- Graphics vs. visuals.
- *Evaluators* applies to people who read any part of a proposal. *Readers* applies to people who read non-proposal documents.

No reference book can answer every question. To help answer difficult, more specialized, or more obscure questions, refer to one of the numerous excellent books, references, or online resources available.

Acknowledgments

My thanks to the many people who generously gave advice, assistance, and support:

- The hundreds of clients from nearly 30 countries who taught me so much while I was trying to help and teach them.
- My fellow consultants who patiently reviewed multiple drafts and suggested improvements. I apologize for not being able to name all of you.
- My partners at Shipley Associates, who supported the preparation of the *Proposal Guide*.

Several people must be both thanked and named:

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- Sonya Bankhead, for graphics, page, and document design, and production management of the integrated, three-*Guide* series. Lynn Allen, Lisa Davis, Kathy Rettenberger, and Patti Ferrin for their design and editing support on this or prior editions.
- Nancy Rosen, my wife, for understanding and encouragement while I worked on all Editions.



About the author

Larry Newman is Vice President and a founding partner of Shipley Associates. He joined Shipley Associates in 1986 as a consultant and training facilitator, helping clients win competitive business in 30 countries and varied selling environments.

Mr. Newman authored all three Shipley Associates *Guides*: *Proposal Guide*, *Capture Guide*, and *Business Development Lifecycle Guide*. The *Shipley Proposal Guide* was awarded the Society for Technical Communication's Award of Excellence in 2008. With approximately 50,000 copies in print since 1999, the *Shipley Proposal Guide* was selected as the basis for APMP proposal management professional certification. In 2010, he authored the *Shipley Capture Guide*, 2nd Edition. Like the *Proposal Guide*, several organizations have selected it as the basis for professional capture management certification.

He has developed and facilitated numerous Shipley Associates workshops in capture planning, proposal writing and management, executive summary writing, sales writing, and costing. He is an Association of Proposal Management Professionals (APMP) Fellow, is APMP accredited at the Professional level, and has presented at more than 20 professional association conferences. He also developed the *Proposal Guide* podcast series in 2008, downloadable on iTunes.

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