



OST GLOBAL SOLUTIONS



***... Because there is no second place in proposals!™***



# The Bid & Proposal Academy Course Catalog

*Federal Business Development, Capture, and Proposal Development*





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## ABOUT OST GLOBAL SOLUTIONS

OST Global Solutions is a home of the Federal Business Development Center of Excellence and Bid & Proposal Academy. We help businesses grow through business development services, consulting support, and training. OST has won more than \$20 billion for our large, mid-tier, and small business clients since our inception in 2005, not counting Indefinite Delivery/Indefinite Quantity (IDIQ) vehicle ceiling values. We use a set of highly effective business and proposal development processes based on the latest best practices.

Our company is a thought leader in the business development field, with dozens of articles, tools and courses used by top Federal contractors. We are heavily involved with the Association for Proposal Management Professionals (APMP), an international organization dedicated to maintaining professional standards for the business development industry. OST's founder, Olessia Smotrova-Taylor, has served as the president of the APMP-National Capital Area Chapter for two years, and as the president, of the National Contracts Management Association (NCMA) Bethesda/Medical chapter for another two years.



Several other OST staff members have served on the APMP-NCA board and various committees. Members of the OST staff regularly speak at the APMP and NCMA events.

Through our Winning Edge Package and other services, we help our customers grow revenue while keeping low Bid & Proposal (B&P costs). We have supported numerous companies from inception to making it on the list of the fastest growing businesses in the nation.

OST provides Business Development services to help clients develop their strategy for expanding their government consulting practices and develop and maintain effective opportunities pipelines. We help companies pre-qualify opportunities, and assist them in building relationships with prospective government buyers.

We also provide process improvement services helping companies enhance their internal business development, capture, and proposal capabilities.

Our Bid & Proposal Academy is designed to help business developers hone their skills necessary for each facet of the profession, and reach certification that will result in greater pay, career progression and ability to grow their companies.



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## OST'S BID & PROPOSAL ACADEMY



### What is the Bid & Proposal Academy?

Our Bid & Proposal Academy provides training and certification for proposal professionals. Our certification is especially useful because it distinguishes between different career paths for business development professionals. We have created more than a dozen courses to help proposal professionals achieve a well-rounded knowledge of their respective fields. The Bid & Proposal Academy's headquarters are in Rockville, Maryland, but we are able to present courses via webcasts and at other locations, including your offices.

### Who would benefit from Bid & Proposal Academy certification?

Our certification program is for business development professionals with different specialties, including:

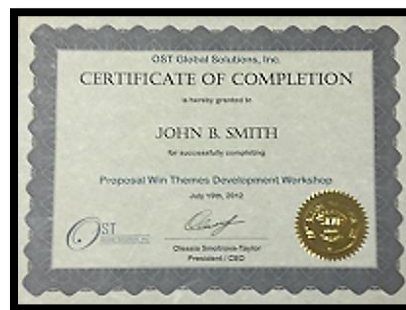
- Business Developers
- Capture Managers
- Proposal Managers
- Proposal Coordinators
- Proposal Writers
- Management and Executives
- Proposal pricing specialists who contribute to proposal development
- Subject Matter Experts
- Project personnel involved in project execution, business development, and proposal preparation

### Why should you invest in certification?

Our certification program will:

- Enable you to develop into a more versatile and knowledgeable professional
- Help your organization succeed through higher win rates, speed, and productivity
- Provide faster career progression
- Provide greater job security or become more employable regardless of the state of the economy
- Offer greater recognition of your expertise and authority in the field of proposals

- Enhance your resume
- Offer Continuing Education Units (CEU) for your APMP Certification, or Professional Development Units (PDU) for your Project Management Professional (PMP) certification and other certifications



### What is the certification program?

We currently offer the following certifications:

- Certified Federal Business Developer (CFBD)
- Certified Capture Manager (CCM)
- Certified Proposal Manager (CPM)
- Certified Proposal Coordinator (CPC)
- Certified Proposal Writer (CPW)

Just like a college degree, each certification requires a certain number of core, major, and elective courses. Every certified professional must go through the rigorous program to master all the fundamental and advanced aspects of the profession, in order to prepare for the real world of business development.

- Each course in our program consists of one or two units. One day of class is equivalent to a single unit or 7 hours of instruction. In order to become certified, a professional has to take the following courses:
  - Three core classes (6 units):
    - Foundations of Proposal Management
    - Foundations of Capture Management
    - Writing Persuasive Government Proposals
  - All the major classes required for the specific certification type (6 units)
  - At least two elective classes (4 units)

In order to complete the certification process, a professional must take a written exam designed for their specific program.



### How can I earn credits?

Proposal professionals can take courses or earn credits towards certification in the following ways:

- Through OST's public workshops
- Through OST's training at your company
- By applying for credit and showing proof of APMP accreditation: A Foundations accreditation is worth 1 unit; a Practitioner accreditation counts for 2 units; and a Professional accreditation counts for 4 units

- By applying for credit after having taken any of OST's classes since 2009; These classes can qualify toward core, major, or elective credits, depending on the course.

### What courses need to be taken towards each certification?

The certification tracks are presented on the matrix below. Each class and track is color-coded, depending on whether the course is a core class, a major class, or an elective class.

Legend	c	Core							
	m	Major							
	e	Elective							
			Class Name	Units	Business Developers	Capture Managers	Proposal Managers	Proposal Coordinators	Proposal Writers
1	c	Core	Foundations of Capture Management	2	c	c	c	c	c
2	c	Core	Foundations of Proposal Management	2	c	c	c	c	c
3	c	Core	Writing Persuasive Government Proposals	2	c	c	c	c	c
4	m	Major	Advanced Capture Management	2	m	m	e	e	e
5	e	Elective	Advanced Proposal Management	2	e	e	m	m	m
6	m	Major	Foundations of Federal Business Development	2	m	m	e	e	e
7	m	Major	Win Themes Development Workshop	1	m	m	m	e	m
8	e	Elective	Developing a Winning Cost Volume	2	e	m	m	e	e
9	e	Elective	Proposal Graphics Conceptualization and Design Workshop	1	e	e	m	m	m
10	e	Elective	Desktop Publishing for Proposal Professionals (MS Word)	1	e	e	e	m	e
11	e	Elective	Winning Multiple Award Contracts & Task Order Proposals	2	e	e	e	e	e
12	e	Elective	Developing and Coaching Oral Proposals	2	e	e	e	e	e
13	e	Elective	Business Development for Project Personnel	2	e	e	e	e	e
14	e	Elective	Foundations of Pricing and Estimating	2	e	e	e	e	e
15	e	Elective	Proposal Editing Workshop	2	e	e	e	m	m
16	m	Major	Executive Summary Secrets (self-study course)	1	m	e	e	e	e

### What is the cost of certification?

Our website contains the latest pricing, and the most current schedule. We encourage you to pay for the full certification instead of taking individual classes piecemeal, to obtain significant savings in taking our courses.

### How do I register?

Register for public courses online at:

[www.ostglobalsolutions.com/bid-proposal-academy-courses](http://www.ostglobalsolutions.com/bid-proposal-academy-courses). You may also register by phone if paying with a credit card, or by invoice.

The payment must be received 5 business days prior to the class start day.

### Can I receive CEUs or PDUs through OST's Bid & Proposal Academy?

Currently, each of our courses counts as 3 CEUs towards your APMP accreditation. You can also apply these courses towards PDUs for your PMP certification.

These courses may count towards other certifications that you hold—you can check with the certifying body to confirm.





## AVAILABLE TRAINING OPTIONS

**Classroom seminars and workshops.** Our one and two-day seminars are conducted at our training facility in Rockville, Maryland. Live webcast options are available for those who do not want to pay for travel—you can take the entire course from your desk. All you need is the computer and Internet connection.

**On-site corporate classes.** In addition to our public courses, we can conduct onsite workshops in a variety of formats:

1. Concentrated one-day classroom “crash-course” training at your company in winning government business, with course content customized to your immediate needs. This training will improve your win rates and get your staff on the same page.
2. A multiple-day, in-depth, hands-on workshop series to teach your team the capture and proposal techniques. This is by far the most effective training, usually delivered over the course of two to five days, customized to your needs. After completing this course, your personnel will have the knowledge of the full suite of capture and proposal methodologies to grow your company.
3. A distance learning course for your staff spread across multiple locations. We can deliver the entire course at once or split into a series of webcasts. It can be regular day-long live capture and proposal classes, or a class split into a series taught over breakfast or lunches, to reduce your staff’s time away from daily activities.
4. Provide just-in-time training for your entire proposal team for your strategic pursuits—in person or via a webinar. This will help you increase your probability of winning your must-win proposal.

All of our corporate courses consist of modules that we can combine in a variety of ways to design a custom course that best suits your personnel’s needs. We can

use your proposals to create exercises that are highly relevant to you, or even use an active pursuit as a class project.

The benefits of onsite courses are many, including:

- Ability to customize the course the most relevant way to your staff
- Space to openly discuss competition-sensitive matters
- Savings on travel for multiple trainees versus one instructor’s travel expenses
- Significant savings per seat.

*Additional courses available for onsite training.* In addition to the courses listed above, we have other classes available for onsite training only, no longer offered as public workshops:

- *Solution Development:* A course highly recommended for capture managers, proposal managers, solutions architects, and proposal writers. It combines elements of our Win Themes Development class, Advanced Proposal Development and Advanced Capture.
- *The Art of Capture:* An aggregate course that combines topics in the Foundations and Advanced Capture Management courses.
- *Winning Government Proposals:* An aggregate course that combines topics in the Foundations and Advanced Proposal Management courses.
- *Color Team Review Training:* How to Raise Proposal Quality Through Effective Color Team Reviews: A course recommended for your reviewers that teaches them how to be effective when they participate in your Pink, Red, and other color review teams.

**Self-study courses and professional tools.** In the last section of this catalog, we include the listing of our comprehensive self-paced courses with manuals, CDs, and DVDs, and professional development tools that can be reused from proposal to proposal.

**Please contact us directly at 301-384-3350 or via email at [service@ostglobalsolutions.com](mailto:service@ostglobalsolutions.com) to discuss onsite training at your company!**





## HOW THE BID & PROPOSAL ACADEMY IS DIFFERENT

Our courses are based on key principles that differentiate us from others in the market:

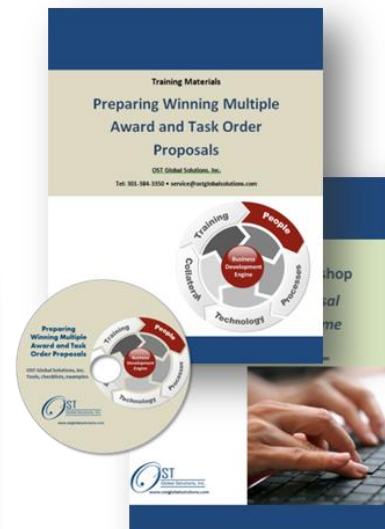
1. Our content is continuously updated based on the latest best practices and trends. We don't teach stale proposal principles from the last decade. Instead, we build on what has worked for years, continuously adjusting the practices we teach to the changing procurement realities and competitive landscape.
2. Our participants learn far more than just process. You will receive the most sophisticated and detailed tools, shortcuts, and exact how-to instructions on the secrets of winning government proposals.
3. Our class materials contain embedded multimedia and graphics-rich animated slides,

complete with hands-on exercises and discussions. We use highly interactive adult learning techniques in order to aid our students in better understanding and retention.

4. Our instructors are currently practicing proposal professionals whose years of experience allow them to offer valuable insights to our students. Our instructors can answer tough questions as they come up during the course. They can also tailor the material to their students' specific challenges, and share their experience based on the current realities.

5. Each course's curriculum builds on other courses to provide a systematic and comprehensive understanding of the profession.

*Here are the examples of media-rich teaching aids for our courses:*



### **Slides, Workbooks, and CDs**



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**DETAILED DESCRIPTIONS AND CURRICULA**

## **CLASSROOM / LIVE WEBCAST COURSES**



## FOUNDATIONS OF CAPTURE MANAGEMENT

Your chances of winning a government proposal without capture are the same as cutting classes during the semester and hoping to get an A on the final exam. This Foundations of Capture Management course will arm you with real knowledge and tools you can apply immediately to capturing contracts and dramatically improving your odds of winning.

Master techniques for customer engagement, intelligence gathering, win strategy development, competitive analysis, teaming, solution development, and more. This is an interactive 2-day workshop that is 50 percent lecture, 40 percent exercises, and 10 percent discussion. It will teach you real skills to raise the win probability of the government contracts you pursue.



This is a Core Curriculum Course for Bid & Proposal Academy Certification Program

### Learning Objectives

The participants will learn and practice skills in:

- Understanding where capture fits in the business development lifecycle
- Identifying six types of decision makers and developing relationships with the customer
- Preparing customer profile and contact plan
- Collecting the opportunity intelligence in ethical ways and analyzing it for applicability to the capture effort
- Developing a capture plan
- Developing a win strategy and compelling win themes
- Identifying top competitors and performing competitive analysis
- Identifying and vetting potential teammates
- Postulating the requirements before RFP issuance
- Developing Concept of Operations (CONOPS) and solution sets for proposal sections
- Staging capture materials for proposal
- Preparing a proposal plan and capture schedule
- Organizing the capture team

### Course Curriculum

#### Day 1

##### *Module 1: Introduction*

- Introductions and learning objectives
- Introduction to capture and overview of the capture process to offer you a big-picture perspective
- Overview of the class project

##### *Module 2: Customer Engagement*

- Four key tasks for interfacing and building relationships with customers
- How to identify six key types of government buyers and buying influences, and what they want
- How to create relationships and customer contact plans with your government customers

### Training length:

2 days (2 units)  
Certification Program

### This course is for:

- Capture managers
- Business developers
- Proposal managers
- Proposal coordinators
- Proposal writers
- Business owners
- Sales executives
- Pricing personnel
- Project personnel

### Prerequisites:

None required; General familiarity with government procurement advised

### Course materials:

- Course workbook
- Handouts
- CD with process maps, templates, forms, and checklists

### Additional information:

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- Understanding how your customer buys and using information to gain an edge
- Customer contact plan for marketing, information gathering, and influencing
- Rules of interfacing with government personnel that you don't want to break
- 20 questions for gathering information from the customer during a visit
- **Exercise:** Identify customers and their key goals from business development inputs. Create a customer profile and draft contact plan.

### *Module 3: How to Gather Actionable Intelligence—Since the Best-Informed Wins*

- Ethics of intelligence gathering and how to avoid legal repercussions that may cost you business
- How to collect intelligence during site visits, proposal conferences, and industry days
- The most useful capture research databases and other online resources
- How to analyze opportunity history
- Purposes and key components of a capture plan
- How to develop a capture plan
- **Exercise:** Development of a draft capture plan.

### *Module 4: Developing a Great Win Strategy and Themes to Prepare You to Finish on Top*

- Definition of a win strategy
- How to develop a viable win strategy
- How to devise top-level actions that create a winning offer
- How win strategy is related to win themes
- Three types of win themes
- How to develop powerful proposal-level and section-level win themes that drive strategy
- **Exercise:** Identify win strategies and action items.

## Day 2

### *Module 5: How to Analyze Your Competition*

- Techniques for identifying competitors and their likely strategies
- What information to collect on your competitors



- Where to find data on your competitors ethically
- Relationship between competitive analysis, teaming, and other aspects of capture
- **Exercise:** Identify top competitors and perform competitive analysis. Update capture plan.

### *Module 6: Teaming—How to Choose and Engage the Right Companies*

- How to decide when it is beneficial to team and when it is not
- Teaming strategies pros and cons
- How to decide between priming, subcontracting, joint venture, or a contractor teaming agreement (CTA)
- How to allocate scope between teammates
- Where to find teammates
- How to select and vet teammates that will contribute to your win
- **Exercise:** Identify potential teammates and update capture plan.

### *Module 7: How to Develop a Solution Pre- and Post-Draft RFP to Wow Your Customer*

- Overview of solution development
- Typical problems with solution development
- How to postulate the requirements
- Concept of Operations (CONOPS) development techniques
- Developing solution sets for proposal sections
- Staging capture materials for proposal use
- Preparing a proposal plan
- **Exercise:** Develop a solution for a proposal segment and document in a capture plan.

### *Module 8: How to Manage Your Capture Effort Effectively While Conserving Your Resources*

- Sequence of capture steps and decision gates, and how they line up to the government acquisition process
- How to develop an effective capture schedule that conserves your resources but enables you to prepare well
- How to organize your capture team
- **Exercise:** Develop a capture schedule.

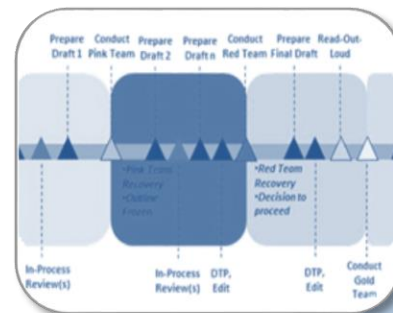
### *Module 9: Summary and Recap*



## FOUNDATIONS OF PROPOSAL MANAGEMENT

The Foundations of Proposal Management course offers comprehensive skills in proposal management. The course begins with the Request for Proposal (RFP) requirements analysis. It then proceeds to proposal planning, outlining your document, and developing a proposal schedule. It also covers preparing for and conducting a Kickoff meeting to organize your proposal team, and guiding authors in developing proposal section content. The course then delves into managing your team, and running proposal reviews, debriefs, and production.

This class offers a rich toolbox of the most sophisticated best practices-based proposal management techniques and tools for every step of the way. It is an interactive 2-day workshop that is 50 percent lecture, 40 percent exercises, and 10 percent discussion. It is built around a hands-on proposal development simulation exercise to practice and discuss each step of the proposal process.



This is a Core Curriculum Course for Bid & Proposal Academy Certification Program

### Training length:

2 days (2 units)

### This course is for:

- Proposal managers
- Capture managers
- Business developers
- Proposal coordinators
- Proposal writers
- Business owners
- Sales executives
- Pricing personnel
- Project personnel

### Prerequisite:

- None required

### Course materials:

- Course workbook
- Handouts
- CD with process maps, templates, forms, and checklists

### Additional information:

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## Learning Objectives

The participants will learn and practice skills in:

- Understanding where proposal management fits in the business development lifecycle
- Understanding what it takes to win proposals
- Understanding process-based approach to proposal management
- Analyzing Request for Proposal (RFP) requirements
- Parsing the RFP to create requirements checklists
- Creating work packages with an annotated outline
- Developing a proposal schedule
- Creating a realistic proposal plan
- Issuing assignments
- Integrating cost proposal activities with the technical proposal development
- Preparing for and conducting a productive Kickoff meeting
- Managing a proposal day-to-day
- Conducting effective Pink and Red Teams, and other types of proposal reviews
- Producing and delivering a compliant proposal before the deadline

## Course Curriculum

### Day 1

#### Module 1: Introduction

- Introductions and learning objectives
- Introduction to proposal management and overview of the business development process to provide a big-picture perspective
- Overview of the class project

#### Module 2: Proposal Process

- Why most proposals don't win and what to do to win—and the most important component that makes proposals win or lose





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- OST's six-phase proposal process to streamline and organize the proposal development effort
- **Discussion:** Proposal process observations.

### *Module 3: Requirements Analysis*

- How to read government RFPs correctly to understand exactly what the government is looking for
- How to parse the RFP to develop a checklist for a fully compliant proposal
- **Exercise:** Analyze and parse the RFP to create a compliance checklist.

### *Module 4: Outlining and Storyboards*

- How to create compliant proposal outline that helps get the highest score
- How to create an annotated outline
- When to use annotated outlines as opposed to storyboards
- How to develop storyboards or writers' work packages that help transition easily from brainstorming to the first draft
- **Exercise:** Create a work package with an annotated outline.

## Day 2

### *Module 5: Developing a Proposal Plan*

- How to create a proposal schedule that will result in an error-free set of proposal documents
- How to develop a realistic proposal plan
- How to develop a proposal organization structure with roles and responsibilities
- Integrating cost proposal activities
- Assigning proposal sections
- **Exercise:** Plan your proposal to develop a realistic proposal schedule.

### *Module 6: Conducting a Productive Kickoff Session*

- How to jump-start your proposal the right way by preparing for and reaching nine all-important Kickoff goals
- Preparing Kickoff Materials
- Planning for the Kickoff
- **Exercise:** Prepare the draft Kickoff Brief for the practice proposal.



### *Module 7: Managing the Proposal Day-to-Day*

- How to manage a proposal team effectively on a daily basis
- Issuing data calls
- Tracking proposal section status
- Managing proposal document workflow and configuration control
- Challenges of managing a virtual proposal team
- Resources for getting non-professional writers to produce better proposal sections and graphics
- **Discussion:** Day-to-day proposal management techniques.

### *Module 8: Conducting Effective Proposal Reviews*

- How to run effective proposal reviews
- Types of proposal reviews
- Planning for and conducting a Pink Team
- Planning for and facilitating a Red Team
- Gold Team standards
- Other types of reviews that may be helpful to your team
- Review forms, inputs, and outputs
- Review recovery effort
- **Exercise:** Review a proposal section for compliance and content; score the section and prepare recommendations.

### *Module 9: Producing and Delivering the Proposal*

- What you need to complete prior to delivery
- How to determine production requirements
- How to estimate the binder size and create tabs
- Proposal cover, spine, and back requirements
- Communicating and collaborating with the production team
- How to polish, print, check, and deliver your proposal on time
- Confirming delivery
- **Exercise:** Develop a proposal production and delivery plan.

### *Module 10: Summary and Recap*



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## WRITING PERSUASIVE GOVERNMENT PROPOSALS

This one-of-a-kind course shows how to develop compliant and highly persuasive proposal sections in half the time or less. It covers detailed methods for outlining within sections, developing compliant section content, infusing proper structure and flow, and implementing correct writing processes and section planning techniques. But this course reaches beyond mere compliance. You will learn how to be persuasive and how to stimulate the reader's interest. You will also find effective ways to overcome writer's block.

The class will explain the difference between good and bad proposal language and cover detailed self-editing techniques, including editing automation. You will learn how to become a better and faster proposal writer. Most importantly, you will acquire the techniques to transform even the most reluctant non-professional proposal writers into prolific section authors.

This workshop is 40 percent lecture, 50 percent exercises, and 10 percent discussion. The workshop exercises will double your writing speed and drastically improve the quality of your written sections by giving you more time to polish them. The results will astound you by making technical proposal writing easier, less time-consuming, and even enjoyable.

### Learning Objectives

The participants will learn and practice skills in:

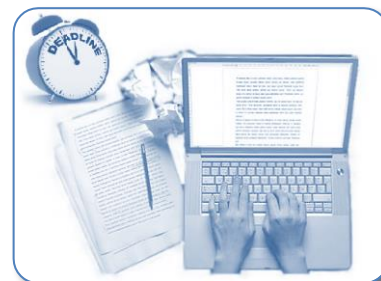
- Understanding the goals of compliance and persuasion
- Analyzing the requirements
- Determining writing focus
- Infusing correct argument structure
- Annotating a proposal section
- Shifting the unhelpful beliefs about writing and positively impacting team's and individual performance psychology
- Brainstorming and planning a section in a group and individually
- Speed-writing proposal sections
- Successfully managing writer's block
- Understanding the elements of proposal persuasion and how to apply them effectively
- Developing proposal stories
- Applying four steps for developing a metaphor
- Editing for content, structure, grammar, and spelling
- Applying readability metrics to written materials

### Course Curriculum

#### Day 1

##### Module 1: Introduction

- Introductions and learning objectives
- Importance of compliance and persuasion in proposal writing
- Class roadmap



This is a Core Curriculum Course for Bid & Proposal Academy Certification Program

#### Training length:

2 days (2 units)

#### This course is for:

- Proposal managers
- Proposal writers
- Business developers
- Capture managers
- Proposal coordinators
- Proposal editors
- Pricing personnel
- Project personnel
- Business owners
- Sales executives

#### Prerequisite:

None required; general familiarity with proposals advised

#### Course materials:

- Course workbook
- Handouts
- CD with templates, forms, and checklists

#### Additional information:

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### *Module 2: Detailed Outlining Within Sections*

- Understanding compliance at the section level
- How to analyze section requirements
- First steps of outlining sections to be compliant and compelling
- **Exercise:** Analyze the requirements for the practice section, determine section focus, and identify key components.

### *Module 3: Infusing Flow for Higher Persuasion*

- Annotating proposal sections
- Understanding proposal flow for higher persuasion
- Infusing proper section flow for a compelling argument
- 8Ws and their order
- **Exercise:** Annotate a proposal section outline.

### *Module 4: Proposal Speed-Writing System*

- Three elements of the proposal speed-writing system

### *Module 5: Overcoming Unhelpful Beliefs about Writing*

- The psychology of performance
- Questions to uncover self-limiting beliefs about writing
- Myths and truths of proposal writing
- Seven techniques to resolve specific psychological hang-ups and overcome self-limiting beliefs
- Where dealing with psychology fits in the proposal process
- **Discussion:** Apply concepts learned in class to the unhelpful personal beliefs and discuss ways to overcome them.

### *Module 6: Stage 1 of the Correct Writing Process*

- Correct writing process to write faster and more effectively
- Stage 1 of the correct writing process
- Intelligence gathering to answer the 8Ws
- Three steps for successful group brainstorming
- Helping your group become more creative in generating ideas



- Tools and techniques for brainstorming individually and preparing to write
- **Exercises:** Brainstorm in a group. Brainstorm individually and plan the actions.

### *Module 7: Stage 2 of the Correct Writing Process*

- Stage 2 of the correct writing process
- The main secret to writing fast and well
- Writing rules
- Speed-writing tools
- Where Stage 2 fits in the proposal process
- **Exercise:** Speed-write the proposal section.

## **Day 2**

### *Module 8: Beating the Writer's Block*

- Elements of proposal writing procrastination
- Four categories of methods to break free from the writer's block and help your proposal team
- How to manage writing time
- **Discussion:** Methodologies participants will use to deal with their writer's block.

### *Module 9: The Dark Art of Proposal Persuasion*

- The dark art of persuasion, and how it applies to proposals
- Proposal language: what sells
- The anatomy of proposal persuasion
- Understanding evaluators' individual drivers
- Proper structure of the argument for better persuasion
- **Discussion:** Integrate the material learned in the module and apply to specific customer situations.

### *Module 10: Use of Story in Proposals*

- How to use story that makes boring proposal writing come alive
- Elements of a strong proposal story
- Eleven story types appropriate in a proposal
- **Exercise:** Develop a story for the practice proposal section.

### *Module 11: Harnessing the Power of Metaphor*

- Types of metaphors



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- Metaphor rules
- Four steps for building an effective metaphor.
- **Exercise:** Create a metaphor for the practice section.

### *Module 12: Stage 3 of the Correct Writing Process*

- Stage 3 of the correct writing process
- Where Stage 3 fits in the proposal process
- OST's four-part editing checklist
- **Exercise:** Apply checklist parts 1 and 2 to the draft.

### *Module 13: Self-Editing and Editing Automation*

- How to configure and apply editing tools



- Readability and its tools
- How to avoid sentence bloaters and reduce wordiness
- Enemies of clear writing
- Language that kills persuasion
- Configuring MS Word for editing
- Writing efficiencies in MS Word
- Additional editing tools and techniques
- **Exercises:** Configure MS Word. Watch editing demo. Apply checklist parts 3 and 4 to finalize the draft.

### *Module 14: Summary and Recap*



## ADVANCED CAPTURE MANAGEMENT

This course takes capture management to the next level—showing what it takes to maximize win probability; mastermind the most effective win strategy using the cutting edge techniques; masterfully facilitate brainstorming sessions such as Black Hats, Win Strategy and CONOPS workshops; perform advanced competitive analysis; create advantageous teaming arrangements; apply formulas to solution development; and much more.

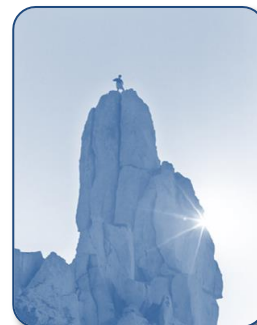
The course also focuses on measuring and improving cost-efficiency and effectiveness of the capture team. This course is for those who have already taken Foundations of Capture Management, and have experience with capture management. It builds advanced skills by offering a deeper understanding of theory and practice of capture management, expanding abilities through best practices-based methodologies, and providing toolsets for immediate implementation.

It is an interactive 2-day workshop that is 50 percent lecture, 30 percent exercises and case studies, and 20 percent discussion.

### Learning Objectives

The participants will learn and practice skills in:

- Understanding how advanced capture techniques offer an edge in a competition
- Building strong and lasting relationships with government customers
- Shaping opportunities and requirements
- Gathering intelligence like a professional analyst, and distilling it to drive capture strategy and proposal development
- Facilitating win strategy development sessions
- Developing a solid value proposition
- Turning advanced win strategies into action
- Unseating incumbents and defending one's position as an incumbent
- Using seven most useful competitive analysis techniques
- Understanding Price to Win and competitive analysis for Multiple Award contracts
- Facilitating Black Hat sessions that produce actionable intelligence
- Applying strategic principles to teaming
- Navigating the small business subcontracting rules to benefit from the socioeconomic programs and avoid hidden trouble
- Negotiating binding teaming agreement to protect bidder's interests
- Developing an executive summary, management, technical, risk, price strategy, past performance, resumes, staffing, and other approaches
- Pre-staging of capture materials for proposal development
- Focusing the capture effort and measuring its effectiveness



This is a Major or Elective Course for Bid & Proposal Academy Certification Program

### Training length:

2 days (2 units)  
Certification Program

### This course is for:

- Capture Managers
- Business Developers
- Proposal Managers
- Proposal Coordinators
- Proposal Writers
- Business Owners
- Sales Executives
- Pricing personnel
- Project Personnel

### Prerequisite:

Foundations of Capture Management

### Course materials:

- Course workbook
- Handouts
- CD with process maps, templates, forms, and checklists

### Additional information:

service@ostglobalsolutions.com  
301-384-3350 (US, EST)  
www.ostglobalsolutions.com





## Course Curriculum

### Day 1

#### *Module 1: Introduction*

- Introductions and learning objectives
- Recap: overview of the capture process for an advanced big-picture perspective

#### *Module 2: Creating Lasting Customer Relationships*

- How to create strong and lasting relationships with government customers
- Advanced techniques for building an effective rapport with government customers
- Techniques for finding connections and engaging the customer before and after the communication channels close
- Mindset for achieving the most results with government customers
- How to influence the RFP and shape customer requirements
- Organizing key information about the customer and measuring customer relationship
- Engaging decision-makers with a high level of influence
- Legal aspects of customer relationship building or how to keep yourself and your company out of trouble
- **Case Study:** Determine correct and incorrect courses of action as applicable to a real-life scenario.

#### *Module 3: Gather Intelligence Like a Pro, Focusing Time and Effort on Information Needed to Win*

- Differences between data, information, knowledge, and actionable intelligence
- Sources of information and degrees of their reliability
- Where to find the right information on the web, and how to search for data like a professional analyst
- How to harvest valuable intelligence from customer artifacts
- How to distill information from open sources



- How to analyze the data to make the right capture-related conclusions
- Validating and testing data
- A system for documenting intelligence that's most useful for the proposal team
- **Exercise:** Research and analyze an opportunity based on the information provided.

#### *Module 4: Developing a Win Strategy that Packs a Punch*

- Mastery in facilitating win strategy development sessions
- Finer points of the win strategy development process
- Key components of a strategy
- Developing a value proposition
- How to test quality of the win strategy
- Types of successful win strategies
- Effective use of ghosting
- Strategy for unseating incumbents and defending one's position as an incumbent
- Taking your win strategies to the next level
- Win strategy white paper and its mapping to the action items and solution development
- Developing and tracking strategic action plans
- **Exercise:** Conduct a win strategy development session simulation.

### Day 2

#### *Module 5: Advanced Competitive Analysis to Exploit the Competition's Shortfalls and Neutralize Their Strengths*

- Seven most used competitive analysis techniques and their practical application
- Applying intelligence gathering techniques to competitive analysis
- Competitive analysis for IDIQs with multiple bidders
- Price to Win analysis
- A practical approach to conducting a Black Hat session that produces actionable intelligence
- Turning competitive intelligence into strategic decisions and actions
- **Case Study:** Application of competitive analysis tools.



### *Module 6: Teaming Strategies*

- Strategic considerations that go into forming a team
- When it is best to move forward with a teaming arrangement and when to wait
- How to avoid diluting the scope and dealing with the risk of having too many teammates
- How to choose between exclusive and non-exclusive teaming
- Effective teaming techniques and precautions for teaming with competitors
- Small business subcontracting
- Understanding size rules and potential disqualifiers from bidding
- Elements of a binding teaming agreement to protect bidder's interests
- How to negotiate for success and follow the government contracting and subcontracting negotiating template
- Negotiation tactics and appropriate responses
- **Exercise:** Compare strategic teaming scenarios and determine the most appropriate paths of action.



### *Module 7: Solution Development*

- Executive summary
- Management solution
- Risk management approach development
- Technical approach development
- Developing a price strategy
- Advance preparation of past performance, resumes, staffing, and other solutions
- Pre-staging of proposal materials
- **Exercise:** Prepare risk matrix. Walk through the solution development checklists.

### *Module 8: Capture Process Management*

- Conducting gate reviews focused on results and measurements
- Metrics for capture effectiveness
- **Discussion:** Technique applicability to participants' organizations.

### *Module 9: Summary and Recap*





## ADVANCED PROPOSAL MANAGEMENT

This course takes proposal management to the next level, beyond the proposal process, and into the fine-tuning of the skills indispensable for a senior proposal manager. It covers the spectrum of the most important topics, from preparing for a proposal effort and making a bid-no-bid decision, to orchestrating a great proposal Kickoff, driving subject matter experts to produce winning content, exhibiting superb leadership and management skills, optimizing proposal team performance, getting the most from the proposal color reviews, and mitigating proposal risks at every stage to reduce stress and increase win probability (Pwin). The course also focuses on measuring and improving cost-efficiency and effectiveness of the proposal team.

This course is for those who have already taken Foundations of Proposal Management, or have several years of experience with proposal management. It builds advanced skills by offering a deeper understanding of the theory and practice of proposal management, expanding abilities through best practices-based methodologies, and providing toolsets for immediate implementation. It is an interactive 2-day workshop that is 60 percent lecture, 20 percent exercises and case studies, and 20 percent discussion.

### Learning Objectives

The participants will learn and practice skills in:

- Understanding how to avoid proposal mistakes even mature companies make
- Mastering tools and techniques for making a bid-no-bid decision
- Determining if an RFP is wired
- Planning and managing proposal budget and resources
- Conducting a highly effective proposal Kickoff
- Scaling the proposal process up and down for different size pursuits
- Applying the techniques to produce compelling proposal content that makes a winning difference
- Mastering rapid learning techniques in a new subject matter to provide ample guidance to subject matter experts who develop innovative solutions
- Initiating and facilitating rapid solution and section development for every part of the proposal
- Tracking volume and section progress and quality
- Applying leadership and proposal team building techniques to achieve optimum performance from proposal contributors
- Applying effective communication methods to the proposal team
- Getting results from difficult proposal team members
- Working effectively with remote participants
- Getting the most useful inputs from the color reviews
- Mastering techniques for quickly integrating reviewers' input into the proposal
- Managing proposal risk
- Applying metrics for proposal effectiveness
- Conducting an effective lessons learned session
- Making use of personal and organizational proposal process optimization



This is a Major or Elective Course for Bid & Proposal Academy Certification Program

### Training length:

2 days (2 units)  
Certification Program

### This course is for:

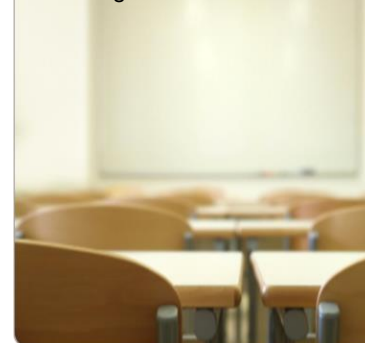
- Proposal managers
- Capture managers
- Business developers
- Proposal coordinators
- Pricing personnel
- Business owners
- Sales executives

### Course materials:

- Course workbook
- Handouts
- CD with process maps, templates, forms, and checklists

### Additional information:

service@ostglobalsolutions.com  
301-384-3350 (US, EST)  
www.ostglobalsolutions.com





## Course Curriculum

### Day 1

#### *Module 1: Introduction*

- Introductions and learning objectives
- Recap: Overview of the proposal process from an advanced big-picture perspective

#### *Module 2: Preparing for the Proposal Effort*

- Top proposal mistakes even mature companies make, and how to avoid them
- Tools and techniques for making a bid-no-bid decision
- Tell-tale signs for when the RFP is wired
- The most important and often missed step before initiating a proposal effort
- How to plan for proposal resources to manage your team to the budget, and ensure adequate resources for proper proposal quality
- Typical failures and complications at the proposal preparation stage and how to navigate through them successfully
- **Exercise:** Develop a proposal resource plan.

#### *Module 3: Orchestrating a Great Proposal Kickoff*

- Psychology of a great proposal Kickoff
- Determining appropriate size and level of proposal Kickoff
- Scaling the proposal process up and down for different size pursuits (including proposal teams with more than 50 participants)
- Tailoring proposal process to the specific pursuit
- Planning Just-in-Time training sessions
- Preparing the Kickoff handouts for best communication and team integration
- Advanced techniques for reaching the nine Kickoff goals
- Typical failures and complications at the Kickoff stage and how to navigate through them successfully
- **Case Study:** Determine correct and incorrect courses of actions as applicable to a real-life scenario.



### *Module 4: Driving the Team to Produce Winning Content*

- Rising beyond the administrative tasks of just “running the proposal process”
- Six steps to owning proposal content and making a winning difference
- Techniques for becoming an expert at being an expert in any proposal’s subject matter
- Professional techniques for interviewing subject matter experts and capturing content effectively
- How to provide ample direction and guidance to subject matter experts
- Typical failures and complications at the content development stage and how to navigate through them successfully
- **Exercises:** Practice rapid learning techniques and determine content quality.

### Day 2

#### *Module 5: Overseeing the Development of Winning Volumes and Sections*

- How to initiate and facilitate rapid solution and section development sessions
- Paying attention to the cost volume—one of the most important parts of your bid
- Managing simultaneous orals and proposal process
- Getting to the winning content: executive summary, management, technical, past performance, resumes, and other sections
- Tracking volume and section progress and quality
- **Exercises:** Compare proposal and non-proposal resume. Build an optimized past performance template.

#### *Module 6: Proposal Leadership*

- Advanced skills for leading a proposal team effectively on a daily basis
- Team building techniques
- Key management skills that distinguish great proposal managers from the rest
- Keeping the excitement, motivation, and momentum for your proposal team
- Methods of effective communication with the proposal team





## OST GLOBAL SOLUTIONS

- How to coach and train your proposal team
- How to get results from difficult proposal team members
- How to work effectively with remote participants
- Mastering data calls
- Typical failures and complications of proposal leadership, and how to successfully navigate through them
- **Exercise:** Practice proposal team building techniques.

### *Module 7: Getting the Most from the Proposal Color Review Teams*

- Rules of thumb for selecting the right number and types of reviews
- Setting the right tone for the review regardless of your company's review process
- Preparing directions for reviewers
- Various methods for conducting reviews and their suitability for your proposal
- Techniques for quickly integrating reviewers' input into your proposal
- How to get the most useful inputs from the reviewers
- Typical failures and complications as related to proposal color reviews, and how to successfully navigate through them
- **Discussion:** Troubleshooting organizational review processes and identifying improvements.

### *Module 8: Improving Proposal Performance*

- Troubleshooting your proposal development plan and proposal risk management
- Navigating through difficult proposal interfaces
- Facilitating smooth transition from capture to proposal team
- Transitioning from storyboards to draft
- Scaling the proposal effort up and down depending on the natural lifecycle
- Effective management of proposal budget
- Metrics for proposal effectiveness
- Conducting an effective lessons learned session



- Personal and organizational proposal process optimization
- **Exercise:** Allocate resources based on the proposal lifecycle, and identify risk areas.

### *Module 9: Summary and Recap*



## FOUNDATIONS OF FEDERAL BUSINESS DEVELOPMENT

This course offers essential skills in professional business development. It begins with an overview of the federal business development process and what it takes to succeed in the profession. It proceeds to the basics of doing business with the U.S. Government. It then focuses on the nuances of government contracting that every business developer has to understand in order to win contracts, such as rules of the socioeconomic program for small businesses, and how you can make the program serve your goals even if you do not directly qualify for the benefits.

The course also teaches practical skills in conducting market research used to both identify federal customers and build a robust opportunities pipeline. After thoroughly explaining tactical tasks, the course then demonstrates strategies for business development planning that every business developer needs to know. The course culminates in instructions for both engaging with the Federal customers and marketing to them effectively.

The course is an interactive 2-day workshop that is 50 percent lecture, 30 percent exercises, and 20 percent discussion. It is built around hands-on exercises and scenarios to practice and discuss key steps of the business development process.

### Learning Objectives

The participants will learn and practice skills in:

- Understanding what skillsets and qualities it takes to succeed in the Business Development profession
- Getting and maintaining government contractor registrations
- Navigating federal regulations
- Taking advantage of the socioeconomic program benefits
- Leveraging the SBA and other agencies' Mentor-Protégé Programs
- Correctly determining company's business size and understanding its importance
- Leveraging different forms of selling to the government
- Understanding the rules for source selection and contract awards
- Performing market research to identify target federal agencies and government contacts
- Building a solid government opportunities pipeline
- Using capture intelligence databases effectively
- Qualifying an opportunity to ensure the highest win probability
- Setting strategies for winning business in the government contracting arena
- Calculating a business development budget
- Identifying Must-Win opportunities
- Securing visits to government clients
- Understanding the rules of marketing to the Government
- Building effective relationships with Government customers
- Developing BD collateral
- Identifying venues for effective business development
- Targeting potential teammates



This is a Major and Elective Course for Bid & Proposal Academy Certification Program

### Training length:

2 days (2 units)

### This course is for:

- Business developers
- Business owners
- Account and sales executives
- Capture managers
- Recent retirees from the Government seeking to become professional Business Developers
- Business-to-business sales executives seeking to learn federal sales

### Prerequisite:

- None required

### Course materials:

- Course workbook
- Handouts
- CD with templates, forms, and checklists

### Additional information:

service@ostglobalsolutions.com  
301-384-3350 (US, EST)  
www.ostglobalsolutions.com





## Course Curriculum

### Day 1

#### *Module 1: How to Succeed in Business Development*

- Federal business development lifecycle
- Four categories of actions for growth government contractors have to take to succeed in the federal marketplace
- A perfect Business Developer – how to become the secret weapon for your company's (and career's) explosive growth
- Business Development skill set and essential qualities

#### *Module 2: Foundations of Federal Contracting*

- The basics of doing business with the government
- Taking care of registrations (whether you are new to government business or not)
- Minding your D&B rating and PAYDEX score
- Federal market snapshot: who are the target agencies and buyers, and how to identify them
- How to navigate the Talmudic federal acquisition regulations and agency guidelines like a pro

#### *Module 3: Government Procurement Process*

- Budgeting cycle and why it is important to understand it
- Complex procurement process
- Determining your target agency's acquisition process

#### *Module 4: Socioeconomic Programs*

- Small and disadvantaged business types in the socioeconomic program
- Using socioeconomic programs to your advantage
- Qualifying for an 8(a) program
- Benefits and pitfalls of the 8(a) program
- The scoop on SBA and other Mentor-Protégé Programs, including what to ask from your mentor

- Determining your business size, and why size makes a difference in government procurement
- NAICS selection strategy
- **Exercise:** Using a case study, determine what the company is missing in order for it to succeed in the Federal Market.

#### *Module 5: How the Government Enters into Contracts with Industry*

- Forms of selling to the government
- Competitive outlook in government procurement to determine the market openness
- Purchasing thresholds and micro-purchasing
- Five tests to determine whether you need a GSA schedule
- Contract types and why they are important
- Goals of business development and capture
- Single award competitions
- Multiple award contracts
- Sole source awards
- Becoming a Defense Logistics Agency (DLA) supplier
- Reverse auctions
- Grants
- Public-private partnerships
- R&D-related vehicles
- Contract types and why they are important
- Evaluation factors such as Lowest Price Technically Acceptable (LPTA) and Best Value
- **Scenario-based Discussion:** Discuss strategies for procurements at different purchasing thresholds and evaluation criteria.

#### *Module 6: Market Research to Find Customers for Your Company*

- Identifying agencies that buy what your company sells
- Identifying top contractors for the agency
- Conducting market research like a professional analyst
- Performing an initial competitive analysis
- Finding government contacts



## OST GLOBAL SOLUTIONS

- Getting maximum help from OSDBUs, vendor outreach events, and other methods of entering the agencies
- **Exercise:** Research a customer and competitors based on a company's core capabilities.

### *Module 7: How to Build a Solid Opportunities Pipeline*

- Creating a balanced pipeline that's an engine of explosive business growth
- Implementing an integrated, multifaceted approach to finding government contracting opportunities
- How to use capture intelligence databases effectively
- Where to register to receive notifications of procurement opportunities
- How to get face time with the customer
- How to leverage your workforce and partners

## Day 2

### *Module 8: How to Obtain Sole Source Awards*

- Reducing competition and obtaining sole source awards
- Adding scope to existing contracts
- Understanding regulations for issuing sole source contracts
- Sole source award process for businesses not subject to statutory exceptions
- Unsolicited proposals
- How to work with the government to facilitate the sole source award
- How to write proposals for sole source procurements
- How to write effective J&As
- How to receive an 8(a) sole source award
- How to obtain an SDVOSB sole source award
- Exclusions for using SDVOSB program
- How to obtain HUBZone sole source awards

### *Module 9: Additional Methods of Building a Robust Opportunities Pipeline*

- How established government contractors create opportunities



- How to identify immediate opportunities to add revenue
- Additional techniques to attract opportunities to your company
- Networking venues for effective face-to-face business development
- Qualifying an opportunity to ensure it fits within your strategic BD plan, has a high win probability, and low execution risk
- **Exercise:** Qualify an opportunity based on a provided scenario.

### *Module 10: How to Create a Strategic Business Development Plan*

- Four main goals of a Strategic Business Development Plan
- Methodology for conducting a strategic business development planning session
- How to transition to priming in a new market or as a new business
- How to calculate a business development budget, and how many proposals do you have to submit to achieve the desired growth
- Analyzing and expanding your core competencies
- Identifying Must-Win opportunities
- Strategies for winning business consistently in the government contracting area
- **Exercise:** Calculate business development budget based on a scenario.

### *Module 11: Engaging with the Federal Customers*

- How to market your company to the Feds
- The rules of marketing to the Government you cannot break at any cost
- How to get face time with the customer
- How to become a trusted advisor
- What collateral you need for effective business development
- What to include in a high-impact capability statement specific to federal government customers
- Contact opportunities to legally "wire" the scope to your company



- Professional associations to join for business development purposes
- How to target potential teammates to be added to a winning team
- Four important goals of working with the customer
- How to prepare for effective capture (and what an effective capture process will help you achieve beyond business development)
- How to attract customers to your company through the Web and social media
- Low, medium, and high-cost marketing activities effective with the government
- **Exercise:** Critique a capability statement to identify missing information and recommend improvements.

#### *Module 12: Transitioning to the Capture Process*

- Qualifying an opportunity
- A review that kicks off the capture process
- Components of the capture process

#### *Module 13: Summary and Recap*





## WIN THEMES DEVELOPMENT WORKSHOP

This workshop offers valuable skills in win theme development. Win themes are arguably the most important element of proposal persuasion. The course walks you through the purpose of win themes and their building blocks. It then advances beyond the mere basics in order to explain everything needed to develop effective proposal win themes. It shows how to write win themes that are memorable and capable of influencing your customers so that they feel compelled to select your company. You will learn to develop win themes within hours instead of days spent in boring and unproductive brainstorming sessions. You will also acquire techniques to transform win themes into win strategies, and help increase win probability.

This workshop is 40 percent lecture, 50 percent exercises, and 10 percent discussion. Participants will learn how to masterfully facilitate win themes development sessions, and will never have to struggle with creating the right win themes or win strategies.

### Learning Objectives

The participants will learn and practice skills in:

- Understanding goals and characteristics of effective proposal win themes
- Knowing the types and categories of win themes
- Recognizing and applying the building blocks of a successful win theme
- Identifying customer hot buttons necessary for win theme development
- Using a three-session win theme development process
- Refining and enhancing win themes
- Deriving a pursuit win strategy and developing strategic actions from your win themes
- Applying advanced win theme development concepts
- Presenting win themes effectively in a proposal
- Facilitating the win theme development process and applying its principles in course participants' organizations

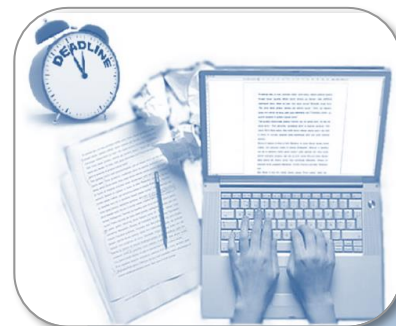
### Course Curriculum

#### Module 1: Introduction

- Introductions and learning objectives
- The purpose of win themes

#### Module 2: Defining Win Themes

- Typical problems with win themes
- Definition of win themes
- Rules of thumb for win themes
- Variety of win theme forms and their examples



This is a Major or Elective Course for Bid & Proposal Academy Certification Program

#### Training length:

1 day (1 unit)

#### This course is for:

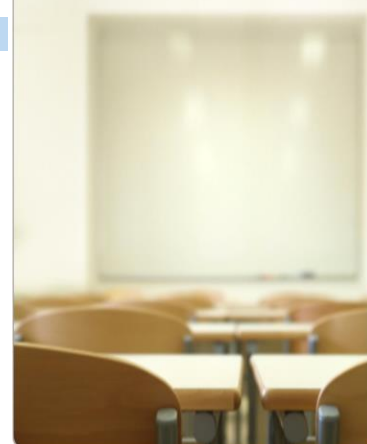
- Business developers
- Capture managers
- Proposal managers
- Proposal coordinators
- Proposal writers
- Business owners
- Sales executives
- Pricing personnel
- Project personnel

#### Course materials:

- Course workbook
- Handouts

#### Additional information:

service@ostglobalsolutions.com  
301-384-3350 (US, EST)  
www.ostglobalsolutions.com





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- Characteristics of effective win themes
- Three general categories of win themes
- **Discussion:** Types and categories of win themes used in participants' proposals.

### *Module 3: The Anatomy of Win Themes*

- Building blocks of effective win themes
- Function of each building block and its identifying questions
- Dissecting each of the win themes building blocks
- Checklists and questions for defining the building blocks
- Making your win themes believable
- Real reasons why people have trouble identifying benefits
- Identifying the customer's sweet spot
- Techniques for disciplined construction of win themes
- Examples of successful win themes
- **Exercises:** Identify each of the building blocks and their relevance to the customer. Deconstruct a complex win theme.

### *Module 4: The Secret Sauce—Efficient and Effective Win Theme Development Process*

- Win themes development session
- Inputs into a win themes development Session 1
- Outputs from a win themes development Session 2
- How to automatically shift focus from you to the customer
- Definition and types of hot buttons
- Techniques for identifying hot buttons
- Framework with a checklist for recognizing hot buttons
- The secret sauce of win theme development—Session 2
- Examples of win themes that highlight the principle of customer focus
- Session 3: Weeding and refining win themes using a strategic approach



- Facilitating Session 3
- **Exercises:** Identify customer's hot buttons. Apply next process steps to developing win themes. Refine and enhance your win theme.

### *Module 5: Transforming Win Themes into Win Strategies and Action Items*

- Win strategy development using win themes
- Strategic actions development
- Types of strategic actions
- **Exercise:** Derive a win strategy and develop strategic actions from your win theme.

### *Module 6: Advanced Win Theme Concepts*

- Flavors of win themes
- Advanced persuasion techniques applicable to win themes
- Quality check of the win themes
- **Exercise:** Practice changing the win theme's flavor to enhance its effectiveness.

### *Module 7: Placing Win Themes in the Proposal*

- Examples of how win themes should appear in a proposal
- Structure of a win theme in a focus box
- Structure of a win theme in text
- Other instances of win themes
- **Exercise:** Present your win theme in a proposal.

### *Module 8: Proposal Team Facilitation in Win Themes Development*

- Proposal team facilitation tips
- Win theme development process application tips
- Where win theme development fits in the capture and proposal processes
- **Discussion:** How participants will implement win themes development process in their organizations.

### *Module 9: Summary and Recap*





## DEVELOPING A WINNING COST VOLUME

It's a given—price is the most important part of the offer. This is especially true in the days when Lowest Price Technically Acceptable (LPTA) rules, and even when it is a Best Value procurement, the lowest bidder will most likely get the award. Most companies, however, miss the most important elements of process and deliverable for the cost volume, and fail to shine in an area where they could dominate.

This course, developed for those who aim to bridge the gap between the cost and technical teams, will help harness the latest best practices and techniques for dominating your competition in the cost volume. It is composed of 50 percent lecture, 40 percent exercises, and 10 percent discussion.



This is a Major or Elective Course for Bid & Proposal Academy Certification Program

### Learning Objectives

The participants will learn and practice skills in:

- Understanding the basics and principles of creating a cost volume
- Understanding how contract type influences pricing
- Implementing pricing strategies for best value versus lowest price technically acceptable proposals
- Winning on price
- Handling cost volumes if someone is not a numbers person
- Understanding how cost proposal evaluation affects the development process
- Influencing the evaluators to grade your cost volume most favorably
- Developing a Price-to-Win (PTW) analysis that incorporates competitive analysis, program intelligence, and maximizes win probability (Pwin)
- Using your proposal resources most effectively on the cost volume
- Applying tools of persuasion for the cost and business volume
- Refining the cost volume for maximum polish and punch
- Developing and collecting the best assumptions out there
- Developing Work Breakdown Structures
- Using Bases of Estimate to defeat low-ballers

### Training length:

2 days (2 units)  
Certification Program

### This course is for:

- Proposal Managers
- Capture Managers
- Pricing Personnel
- Subject Matter Experts
- Business Owners
- Project Personnel

### Course materials:

- Course workbook
- Handouts
- CD with process
- Maps, templates, forms, and checklists

### Additional information:

service@ostglobalsolutions.com  
301-384-3350 (US, EST)  
www.ostglobalsolutions.com

### Course Curriculum

#### Day 1

#### *Module 1: Cost Proposal Foundations for Non-Finance Professionals*

- Roadmap to winning in cost volumes
- Cost literacy—differences between cost, price, price strategy, and price to win
- Cost and price components basics
- Example of pricing to build comfort of non-finance professionals with the cost volume
- Contract cost principles and procedures





## OST GLOBAL SOLUTIONS

- Cost accounting standards
- Cost and pricing data
- Contract types important to pricing

### *Module 2: Important Details About Cost Proposal Evaluation that Impact Cost Proposal Development*

- Cost proposal evaluation factors, including understanding the difference between pricing strategies for best value and lowest price technically acceptable evaluations
- Evaluation criteria weighting to allocate proposal resources correctly
- Understanding proposal evaluators to address their key concerns
- Cost proposal evaluation process, and how adherence to the process figures into cost proposal preparation
- Understanding evaluation intricacies
- Why the government doesn't end up evaluating the price you bid – and how to avoid the pesky plus-ups

### *Module 3: Cost Proposal Management During Capture*

- Cost team's involvement during the capture process
- Proposal manager's involvement into capture from the cost perspective
- Determining different options for a solution
- Determining your price competitiveness
- **Exercise:** Perform price analysis using a case study.

### *Module 4: Price to Win (PTW) Development*

- Price to Win (PTW) development process
- Top-level flow to create the win
- Questions the technical team can help answer for PTW analysis
- PTW information sources and their use
- How to integrate competitive analysis with a pricing model
- How to perform labor rate analysis
- How to create the win using the PTW



- **Exercise:** Apply strategies in the case study to arrive at the PTW.

### *Module 5: Managing Cost Volume Development during the Proposal*

- Resource planning for the proposal to resource your proposals to win, reduce stress, and establish better control over the proposal budget
- Cost volume development process steps
- Cost inputs into a Bid-No-Bid decision
- How a proposal manager can facilitate the cost development process and work closely with the cost team
- Cost volume manager's role
- Immediate tasks for the proposal manager to oversee while managing the cost team at the proposal start
- Cost team Kickoff tasks checklist

## Day 2

### *Module 6: How to Develop a Highly Persuasive Cost Proposal Narrative*

- Best practices developing a cost proposal narrative
- Cost proposal narrative content
- How to use graphics to depict key pricing themes and discriminators
- How to write a persuasive cost volume executive summary
- **Exercise:** Develop an annotated outline for a compliant and compelling cost volume.

### *Module 7: Cost Volume Refinement Techniques*

- Ensuring that cost and technical volumes agree
- Strategies and techniques to tweak the solution to bring down costs

### *Module 8: Developing the All-Important Assumptions for Better Price Optics and Modifications After Proposal Award*

- How to develop and collect assumptions and proposal basis that help increase cost-competitiveness
- Usual assumptions
- Additional assumptions that help with price optics



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### *Module 9: How to Develop a Work Breakdown Structure (WBS) for Better Proposal and Cost Controls After Award*

- How to develop the Work Breakdown Structure (WBS)
- PWBS and CWBS
- Considerations in CWBS development
- How to scrub the CWBS
- Relationship between CWBS and cost accounts
- How to develop a WBS Dictionary
- **Exercise:** Construct a WBS for the contract

### *Module 10: How to Develop Basis of Estimate (BOE) to Ghost Competition and Provide Greater Confidence to the Customer in Your Cost Proposal*

- Developing the dreaded BOEs that are perfect for ghosting low-ballers
- Pros and cons of estimating methods such as analogy, crosschecks, parametric, and the detailed engineering bottom-up method



- BOE template

### *Module 11: Price Strategies to Win in the Price Portion of Your Cost Proposal*

- How to sharpen the pencils and apply price strategies appropriate for different contract types
- Price strategies for cost-type, fixed price, and other contracts
- How to win in LPTA competitions

### *Module 12: Final Tips on Winning in the Cost Volume*

- Cost volume reviews
- Final tips on how to not be intimidated by cost proposals even if you are is not a numbers person

### *Module 13: Summary and Recap*



OST GLOBAL SOLUTIONS



## PROPOSAL GRAPHICS CONCEPTUALIZATION AND DESIGN WORKSHOP

It is impossible to imagine modern sales and marketing without visual elements—and proposals are no different. Graphics serve as one of the most important proposal persuasion elements.

Professional graphics artists are not the only ones who need to learn how to conceptualize and design persuasive proposal graphics. It also happens to be an indispensable skill for capture managers, proposal managers, and proposal writers. Desktop publishers and even editors will benefit greatly from expanding their professional range and earning potential. This course will also help those who do not have the luxury of working with a professional graphic artist and have to design graphics on their own.

Instead of focusing on how to use graphics tools, this course provides information on everything necessary to come up with the graphics idea that conveys your solution in a customer-centric way to contribute to the persuasive power of your proposal, and ensure that your graphics have a professional look and feel.

This course is 40 percent lecture, 50 percent practice, and 10 percent discussion. You will learn the entire process of creating visuals for your solution, from managing the graphics process to conceptualizing and designing large, graphics-intensive items like cover pages and spines.

### Learning Objectives

The participants will learn and practice skills in:

- Choosing the right type of visual to represent your information
- Planning space for graphics and visuals in the document
- Allocating resources to account for graphic conceptualization, creation, and rendering
- Conceptualizing infographics and customer-centric representations of your solution
- Using basic design principles to create attractive graphics
- Finding and using graphics templates and stock art
- Developing powerful action captions to increase persuasiveness of the graphics
- Creating large, graphic-intensive proposal elements such as covers and spines
- Editing graphics to ensure a professional finish
- Inserting and calling out a graphic in the proposal

### Course Curriculum

#### Module 1: Introduction

- Introductions and learning objectives
- Introduction to graphics and their importance in a proposal



#### Training length:

1 day (1 unit)  
Certification Program

#### This course is for:

- Proposal Managers
- Capture Managers
- Proposal Coordinators
- Proposal Writers
- Graphic Designers

#### Course materials:

- Course workbook
- Handouts
- CD with process maps, templates, forms, and checklists

#### Additional information:

service@ostglobalsolutions.com  
301-384-3350 (US, EST)  
www.ostglobalsolutions.com





### *Module 2: Preparing for Graphics Development*

- Types of visuals in the proposal
- Ideal proportion of graphics and text
- Resource planning for graphics development
- Graphics management process in a large, graphics-intensive proposal
- Rules and free resources for setting up a customer-centric graphics template and palette
- Establishing graphics sizes and mockups
- **Exercise:** Select a graphics template for a proposal.

### *Module 3: Easy Principles of Graphics Conceptualization*

- Three steps to conceptualizing graphics
- Unlocking the creative process
- Sources of inspiration and ideas
- Types of graphic representation, including an infographic representing your entire solution
- Developing customer-focused, persuasive action captions
- Determining the purpose for the graphic
- **Exercise:** Apply three steps to conceptualize a graphic and its action caption.

### *Module 4: Designing the Graphics*

- Seven cardinal graphics rules
- Four design methods for creating graphics
- Sources of graphics templates and stock art
- How to select and apply graphics templates and stock art to ensure professional results
- Graphics tools and their capabilities and benefits
- Using PowerPoint and other commonly available tools to render professional graphics
- Basic design techniques and shortcuts in PowerPoint
- **Exercise:** Create the first draft of the conceptualized graphic using the available resources.

### *Module 5: Finishing Touches*

- Design principles such as alignment, proportion, and balance



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- Editing your graphics to create a professional look and feel
- Designing vignettes, pull-quotes, focus boxes, tables, and other visuals
- **Exercise:** Apply finishing touches to a graphic.

### *Module 6: Creating Covers and Spines*

- Setting up covers
- Preparing cover text
- Selecting photos and images for covers
- Designing spines
- Designing CD covers
- Printing and applying CD covers



- Exercise: Design a proposal cover.

### *Module 7: Graphics in the Proposal Document*

- Preparing the graphics for insertion in the proposal
- Graphics file types and sizes
- Placing graphics on the page
- Rules for referencing graphics in the proposal
- **Exercise:** Insert a graphic and its action caption in the proposal.

### *Module 8: Summary and Recap*





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## DESKTOP PUBLISHING FOR PROPOSAL PROFESSIONALS (MICROSOFT WORD)

This workshop teaches valuable skills in designing, laying out, and publishing proposals—presenting your company’s offer in the most professional light to the proposal evaluators.

The course begins with a foundation in the tools and features MS Word offers to the desktop publisher, and shortcuts to increase speed and efficiency. The course advances into the selection of color palette and styles, tables of contents, headers and footers, and elements of design to ensure your document is attractive. The course then advances beyond the basics, addressing the core challenges of maintaining stabilization within documents while multiple authors contribute to proposal sections using different formatting styles. It culminates in teaching how to publish the document and prepare it for delivery.

This workshop will provide practice files as we work our way through the building of a proposal volume. This workshop is 30 percent lecture, 60 percent exercises, and 10 percent discussion. It will learn how to design and assemble proposal documents to help your company win.

### Learning Objectives

The participants will learn and practice skills in:

- Applying MS Word shortcuts to optimize and accelerate the desktop publishing process
- Create a color palette and design a compliant layout utilizing logos and other graphic media reinforcing your company’s brand
- Developing a proposal template
- Setting up and creating styles that are easy for contributors to apply
- Cleaning up the document to ensure multiple authors’ styles do not destabilize the document
- Understanding cut, copy, past, and paintbrush options efficiently
- Using the Section and Page Break features and understanding how they affect headers, footers, and outlining features
- Working with tables to convey information efficiently
- Inserting material from MS Excel, PowerPoint, Project, Adobe Acrobat, Illustrator, Photoshop, and other types of files
- Establishing an automated and hyper-linked Table of Contents (TOC) anywhere in the document, including several TOCs in the same document
- Creating other lists such as List of Figures, Compliance Matrix, Acronym List, and Index
- Paginating the main page and sub-pages
- Preparing the document for submission



### Training length:

1 day (1 unit)  
Certification Program

### This course is for:

- Desktop Publishers
- Proposal Managers
- Proposal Coordinators
- Proposal Writers
- Proposal Editors

### Course materials:

- Course workbook
- Handouts

### Additional information:

service@ostglobalsolutions.com  
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## Course Curriculum

### *Module 1: Introduction*

- Introduction and learning objectives
- Familiarization with what is possible in desktop publishing
- Tips, Tricks, and Shortcuts
- Moving through the document, split screen, and three ways to accomplish the same function
- Toolbars and Rulers
  - Moving the Quick Access Toolbar
  - Populating Quick Access Toolbar with your favorite tools

### *Module 2: Creating the Outlined Template*

- Choosing a color palette
- Comprehension and incorporation of the Solicitation Requirements
- Styles
  - What is Normal
  - How does Normal affect styles
  - Creating and editing styles
  - Import styles into another or a new document
  - Displaying styles so other users can apply them
  - Cleaning up styles
- Column Breaks
- Page Breaks
- Section Breaks

### *Module 3: Editing the Document*

- Table of Contents (TOC)—Part 1
  - Create your own based on your styles
- Cut, Copy, Paste—Paintbrush
  - Using the Clipboard icon
  - Inserting text from another document
  - Inserting from Excel, PowerPoint and Adobe products
- Tables
  - Sorting in a table
  - Formatting a table with styles
  - Create a table style

- Preparing your graphics for insertion and inserting them into the document
- Keeping graphics from “jumping”
- Table of Contents (TOC)—Part 2
  - Inserting “context specific” TOCs in one document
  - Creating other lists: List of Figures, Compliance Matrix, Acronym List, and Index

### *Module 4: Publishing and Distribution Tips*

- Printing and binding
  - White Glove page check
  - Keeping the exact copy or proof copy for your company (CYA)
  - Preparing box label and receipt
  - Handling the receipt after the signature, attaching it to and archiving the Proof Copy, scanning, and making it a part of the electronic files
- Creating PDF for uploading
- Checking each page for legibility, errors, misprints, or degradation of graphics
- CD, thumb drive or other electronic submissions files checks
- Distribution List
  - Create file list all parties print and keep with Proof Copy
  - Copying of all electronic files onto storage media, including the “archive” or “old” versions, and the “raw” graphics

### *Module 5: Summary and Recap*

- Summary and recap
- Additional resources



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## WINNING MULTIPLE AWARD CONTRACTS AND TASK ORDER PROPOSALS

This course will help the attendees discover the secrets and the exact how-to-recipes for winning and making money on the multiple award contract (MAC) vehicles. This class provides the essential knowledge to win MACs, otherwise referred to as Indefinite Delivery/Indefinite Quantity contracts (IDIQ), Governmentwide Acquisition Contracts (GWAC), Blanket Purchase Agreements (BPA), Multiple Award Task Order Contracts (MATOC), Indefinite Quantity Contracts (IQC), and others and teaches you how to win task order proposals that follow.

**Nearly 1,200 MACs** comprise more than **25 percent of all government contracts**, and are awarded to limited groups of suppliers that bid against each other for orders. Once awarded, MACs enable companies to grow quickly because they can win task orders on them within weeks, as opposed to single-award contracts that can take months or years.

Not every company, however, knows how to benefit from these MACs, even if they happen to win these contracts. Companies run into difficulties in these vehicles without the proper knowledge of how to dominate their better-educated competition. **Agencies keep selecting the same companies while they increase the number of competitors on their MACs.** It means that the companies who have learned “the system” for winning on these vehicles will continue winning and growing their MAC footprint. Until you understand how they do it, you won’t be able to catch up—which is why you should take this course.

Many companies don’t know how to win MACs against dozens, if not hundreds of competitors, because the requirements are broad, and make it hard to shine.

It doesn’t get any easier after winning a MAC as most companies have trouble winning task orders. The deadlines and the page count keep shrinking and the competition gets even tougher, making it harder to win proposals even when you are the most qualified bidder. Responses barely make the deadline because proposal managers learn about many task order requests for proposal only as they are released. The lack of pre-proposal planning leads to throwing boilerplate over the wall and hoping to win on price. We will show you a different way to maximize your task order win rate.

This class is 50% lecture, 30% exercises, and 20% percent discussion. This course will teach you how to crack the MACs’ code and turn them from expensive boondoggles to a force multiplier for your company.

### Learning Objectives

The participants will learn and practice skills in:

- Understanding the MAC trends in government procurement
- Determining what IDIQ portfolio a company should have considering its core competencies and target agencies
- Qualifying an IDIQ for fit and conducting a capture effort to best position to win an IDIQ contract



This is an Elective Course for Bid & Proposal Academy Certification Program

### Training length:

2 days (2 units)

### This course is for:

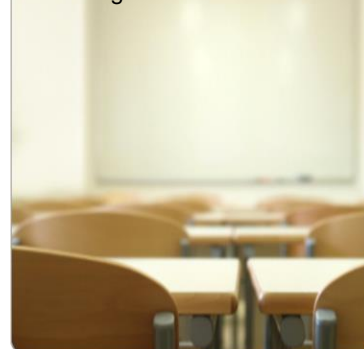
- Proposal Department Directors
- Company Executives and Senior Managers
- Capture Managers
- Proposal Managers
- Business Developers
- Business Owners
- Project Personnel

### Course materials:

- Course workbook
- Handouts
- CD with process maps, templates, forms, and checklists

### Additional information:

service@ostglobalsolutions.com  
301-384-3350 (US, EST)  
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- Contributing to a MAC win not only as a prime but also as a subcontractor
- Developing the IDIQ proposal content with the right answers to win the competition
- Applying the IDIQ pricing strategies
- Understanding why many companies fail to compete effectively and make good money on an IDIQ
- “Cracking the code” of an IDIQ to determine task order patterns and win strategies
- Positioning the right resources to help write persuasive and compliant task order proposals
- Adding more value as a proposal manager on fast-turnaround task order pursuits
- Running mini-capture and creating an IDIQ-specific Customer Map



- Establishing an infrastructure and environment necessary to maximize the task order win rate
- Developing a MAC-specific process for winning task orders
- Developing a reusable toolset for implementing a task order process
- Enacting a comprehensive marketing plan for the MAC
- Getting the entire company involved in winning more task orders
- Building a proposal library for winning fast-turnaround task orders
- Preparing a concise text and information-packed graphics to convey your competitive advantages in an extremely page-limited proposal format

## Course Curriculum

### Day 1

#### *Module 1: Introduction and Learning Objectives*

- MACs foundations—what are the vehicles and how can a company make money on a MAC
- MAC benefits and trends in government procurement

#### *Module 2: Understanding IDIQs and Defining Your Company's MAC Needs*

- Why the government likes IDIQs
- The types of MACs
- Navigating through IDIQ terminology
- How different MACs work and what it means for your business development efforts
- Top 20 MACs Products and services the Government buys through non-schedule MACs
- Top agencies that spent money on MACs
- The differences between IDIQs and requirements proposals
- Problems with leveraging IDIQs
- Techniques to determine what specific IDIQs your company needs
- **Exercise:** Determine what MACs a company needs to have in its portfolio.

#### *Module 3: Preparing to Win and IDIQ*

- Gathering the key information you need to know about an IDIQ to determine whether it is a fit
- Determining proposal preparation details for solution development and resource planning
- Conducting an IDIQ capture effort, including customer engagement, intelligence gathering, win strategy analysis, IDIQ-specific competitive analysis, teaming, and solution development
- **Exercise:** Perform a competitive analysis for an IDIQ with multiple competitors.

#### *Module 4: Developing a Solution and a Winning Proposal for a MAC*

- Developing management, technical, past performance, and other solutions
- Planning for the proposal
- Establishing proposal security given the “incestuous” teaming and non-exclusive subcontractors, while gaining maximum benefit from team’s knowledge
- Special considerations for MAC proposal reviews
- Proposal management best practices for MACs
- Techniques for running an effective virtual proposal with multiple teaming partners



## OST GLOBAL SOLUTIONS

- How to support proposals when you are a subcontractor and not the prime
- **Discussion:** What best practices have the participants followed in preparing a MAC proposal?

### *Module 5: Winning MACs Through Content*

- Mastering the elements that are common from IDIQ to IDIQ
- How to address the common proposal solution elements correctly to meet and exceed government evaluators' expectations
- IDIQ pricing strategies
- **Discussion:** What IDIQ pricing strategies do participants find most applicable to their scenarios?

## Day 2

### *Module 6: The Secrets of Making Money on MACs*

- The only way to make money on multiple award IDIQs
- The reasons why the number of companies winning IDIQs and task orders remains flat while the number of IDIQs and task orders grows
- The secret of how to start “cracking the code” of your IDIQ
- How to determine task order patterns
- How to position to win the majority of task orders
- **Exercise:** Identify patterns for a specific IDIQ.

### *Module 7: Organizing to Prepare Winning Task and Delivery Orders*

- Characteristics of a task order request for proposal
- How task orders differ in format even on the same IDIQ
- Personnel roles and internal and external resources necessary to win task orders
- What atypical proposal role is crucial in fast-deadline and page-limited task order proposals
- Training necessary for your resources to maximize effectiveness and efficiency in preparing winning task order proposals
- **Exercise:** Given a company-specific scenario and resource constraints, determine the best path of

action to establish a high-functioning task order shop.

### *Module 8: Establishing an Infrastructure and Environment Necessary to Maximize Your Task Order Win Rate*

- The tools you will need to develop a task order winning machine.
- The resources required to prepare proposals more efficiently and effectively
- Developing a Task Order Manual to keep the team on the same page
- Determining the marketing rules of engagement for your IDIQ team
- Defining a unified customer message
- **Exercise:** Determine marketing rules of engagement for a specific scenario.

### *Module 9: Developing a MAC-Specific Process for Winning Task Orders*

- Tailoring the process to the specific MAC procurement processes
- Techniques for developing a streamlined task order process
- Example of a task order process
- Conducting a mini-capture for task orders
- Creating a Customer Map
- Influencing the requirements during task order capture
- Developing and enacting an integrated marketing plan for the MAC
- Developing a reusable toolset for implementing your task order process
- **Discussion:** What processes do the participants organizations need to implement or optimize?

### *Module 10: Developing the Task Order Engine to Ensure Wins*

- Setting up and tracking task order details in a pipeline
- Tracking customer-specific information important in task order wins
- Techniques for setting up a MAC-centered proposal library and developing reusable materials
- Types of proposal collateral to keep in the library





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- Involving operations personnel in increasing your task order win rate
- **Discussion:** What are the actions your organization will take to increase your task order win rate?

### *Module 11: Secrets of Preparing Winning Task Order Proposals*

- The biggest value proposal managers can add to running fast turnaround proposals
- Examples and characteristics of text specific to task order proposals
- Examples of infographics used in winning task order proposals
- Rules for developing task order pricing
- Additional resource recommendations
- **Exercise:** Edit text as appropriate for a page-limited task order.

### *Module 12: Summary and Recap*





## DEVELOPING AND COACHING ORAL PROPOSALS

Orals are a preferred method for many customers to see exactly whom and what they are getting as a result of the procurement process. Instead of receiving a proposal written by professional business developers, they opt to see a presentation delivered by those who will perform on the project. Oral proposals, therefore, pose unusual challenges in the development of a compliant and compelling slide design, preparation for the questions and answers (Q&A) sessions and sample task solution development, and presenter coaching. These challenges are complicated by the requirement to develop both written and oral proposals simultaneously; customer-imposed poor ratios between the required slide content and the allotted time to present; unavailability of project personnel for slide development and rehearsals, and presenters' potential fear of public speaking, poor presentation skills, or even speech impediments.

This course covers everything required to develop winning oral proposals, from proposal management and coaching for an orals-only proposal, to managing a blended written and oral proposal, and developing slide decks and coaching the presenters.

This course is 40 percent lecture, 30 percent exercises and discussion, and 20 percent coaching. After this course, you will be better prepared to develop, coach, and deliver a winning oral presentation.

### Learning Objectives

The participants will learn and practice skills in:

- The steps of the optimum oral proposal process
- Developing an oral proposal schedule for an all-orals or blended orals and written proposal process
- Asking the customer questions to clarify orals requirements
- Planning and outlining an oral proposal slide deck
- Allocating the correct amount of speaking time per slide
- Selecting the right presenters and conducting an effective orals Kickoff session
- Creating an attractive, compliant, and information-packed slides template
- Developing the slides with persuasive key points, headlines, and takeaways
- Reviewing oral proposals
- Avoiding the mistakes typical in oral proposal presentation
- Conducting orals rehearsals at the various readiness stages
- Coaching the presenters to deliver an effective presentation
- Understanding how to use and coach others on the correct use of body language, cadence, stories and expressions
- Applying active listening skills
- Preparing the presenters to succeed in Q&A and sample task development sessions
- Conducting preparations in the run-up to orals
- Supporting the team on the orals day, and solving logistical challenges



This is an Elective Course for Bid & Proposal Academy Certification Program

### Training length:

2 days (2 units)

### This course is for:

- Orals Coaches and aspiring Orals Coaches
- Proposal Managers
- Executives and Managers overseeing the orals development process
- Proposal Coordinators
- Capture Managers
- Project Personnel who develop and participate in orals

### Prerequisite:

None required; familiarity with proposal development is strongly advised

### Course materials:

- Slides
- Handouts
- CD with process maps, templates, forms, and checklists

### Additional information:

service@ostglobalsolutions.com  
301-384-3350 (US, EST)  
www.ostglobalsolutions.com



## Course Curriculum

### Day 1

#### *Module 1: Orals Preparation Process*

- Course objectives
- Steps of the optimal oral proposal process
- Overcoming the challenges of the blended orals and written proposal process
- Developing an oral proposal schedule, including the situations when some milestones are still unknown
- Scheduling slide development sessions and rehearsals for busy subject matter expert presenters
- How to ensure availability of the presenters, and integrate them in the proposal schedule
- **Exercise:** Develop a blended oral and written proposal schedule.

#### *Module 2: Planning and Outlining an Oral Proposal Slide Deck*

- Reading between the lines of the orals requirements in the RFP
- Questions to ask the customer specific to oral presentation planning
- “Shredding” the RFP
- Identifying and prioritizing the requirements to obtain the highest score
- Planning the slide deck, including the decision on how many slides to allocate, and how much time to assign per slide
- Outlining the slide deck
- **Exercise:** Develop and annotate an outline for a timed oral presentation

#### *Module 3: Preparing for and Conducting an Effective Orals Kickoff*

- Selecting the right presenters
- Preparing the slide deck worksheets
- Getting the team on the same page
- Preparing and conducting an effective orals Kickoff for successful integration of the effort and prevention of possible problems later
- Just-in-time training for orals presenters
- 

- **Discussion:** Identify elements specific to oral proposals in conducting a Kickoff.

#### *Module 4: Creating an Attractive, Compliant, and Information-Packed Slides Template*

- Principles of effective presentation design, and presenters’ briefing
- Compliant, effective, and easy-to-brief slides that will serve as effective “leave behinds”
- How to coach a graphic artist to produce persuasive and memorable graphics
- **Exercise:** Develop a slides template layout based on the RFP instructions.

#### *Module 5: Developing the Slides*

- Brainstorming to develop a solution
- How to coach the presenters to develop effective headlines, takeaways, and key points
- **Exercise:** Develop slide content, and identify its key elements

#### *Module 6: Oral Proposals Content Reviews and Best Practices*

- How to conduct effective oral proposal reviews
- When to hire an orals coach
- Top ten orals challenges
- How to avoid mistakes in managing and coaching orals
- **Discussion:** Comment on the oral proposal mistakes you plan to correct in your organization

### Day 2

#### *Module 7: Conducting Rehearsals*

- Types of rehearsals, including the murder board and dress rehearsal, and how to structure and lead one
- Preparing your team for a live sample task response
- Conducting effective rehearsals, and designing program that fits the requirements



- **Exercise:** Simulate the rehearsal for the developed slide at the various readiness stages.

#### *Module 8: Coaching the Presenters*

- Coaching the presenters to deliver an effective presentation
- Body language, cadence, stories, and words to use and not to use
- Providing constructive feedback to presenters after each rehearsal
- Getting your team to appear synchronized and convey its "teamness"
- Teaching the skills of how to read a room
- Overcoming challenges when coaching presenters
- **Exercises:** Integrate coaching lessons into the presentation styles. Coach, identify, and correct presentation errors.

#### *Module 9: Preparing the Presenters to Succeed in Q&As and Sample Tasks*

- Coaching and preparing the team to excel during the Q&A session
- Developing and practicing Q&As
- Active listening skills

- Preparing your team for a live sample task response
- **Exercise:** Practice active listening skills and answering questions.

#### *Module 10: Final Preparations for the Oral Presentation*

- Preparations you shouldn't miss as the orals deadline approaches
- Mistakes to avoid in the last 24 hours prior to the orals
- Logistical challenges such as equipment, transportation, presentation room layout, etc.
- Supporting the presenter team on the day of the presentation
- What steps you should never miss after the presentation
- **Exercise:** Develop a plan for the oral presentation delivery.

#### *Module 11: Summary and Recap*



## BUSINESS DEVELOPMENT FOR PROJECT PERSONNEL

This course, intended for subject matter experts and other project personnel, teaches them how to become part of your company's growth engine, and why it's important that they engage in the business development and capture process. It covers BD and capture concepts at a level ideal for project personnel, and shows them specifically where in the process they can make the greatest impact.

If you want to make money by increasing the scope of your existing projects, deepening and improving your relationship with your customers, and ferreting out all the insider-access secrets you can't learn any other way, then it's critical that your project personnel understand and buy into being a part of your BD organization.

### Learning Objectives

Upon course completion, the participants will have learned and be able to put into practice:

- Reasons why your company needs project personnel to help in the BD lifecycle
- Where and how project personnel fit in the BD process
- What your BD organization does
- Overcoming the reluctance to sell
- Understanding your customer's needs
- How to open dialogues with your customers about new opportunities
- What information and help your BD organization will need from you in working with the customer
- How to collect intelligence while you are onsite
- How to distill information from customer presentations and reports, and conversations with end users
- Gathering information ethically
- How project personnel can contribute to developing a solid win strategy
- How project personnel can add to competitive analysis, and help BD stay ahead of the competition

### Course Curriculum

#### Day 1

##### *Module 1: Understanding Business Development as a Project Person*

- Business Development (BD) lifecycle and its key steps
- Your job is not business development – or is it?
- Where and how you fit into the BD Process
  - BD functions of onsite/project staff
  - Where your roles fit with the BD organization's roles
  - Who is who in your BD organization
  - What your BD organization does
    - Opportunity identification
    - Capture management and six aspects of capture



This class is fully customizable to your organization

#### Training length:

2 days (2 units)  
Certification Program

#### This course is for:

- Project Personnel that interfaces with the customer
- Business developers
- Functional personnel
- Executives and Managers
- Capture Managers
- Proposal Managers

#### Course materials:

- Slides
- CD with process maps, templates, forms, and checklists

#### Additional information:

service@ostglobalsolutions.com  
301-384-3350 (US, EST)  
www.ostglobalsolutions.com





- Proposal management other tasks to feed the “growth engine”
- Overcoming the reluctance to “sell”

### *Module 2: Understanding and Working with the Customer*

- Four goals to attain when working with the customer during capture
- Procurement basics
  - Why and how the government buys
  - Types of contracting vehicles
  - Task Order portability
  - Evaluation and contract award process
  - Small business program and its importance to small and large businesses alike
- Five categories of customer and what role do they play in your company’s BD success
- Methods of opening a dialogue about new opportunities with your customers
- Understanding your customer’s needs and recognizing “pain”
- Understanding your customer’s psychology and motivating factors
- Understanding how to deal with limitations of your teaming agreement and/or government contract
- Ethics rules of engaging with the government customer
- Describing your company's and/or team’s capabilities correctly when meeting new contacts
- Creating strong relationships and becoming a trusted advisor

### *Module 3: Serving as Liaison between the Customer and the Company BD Organization*

- Recognizing a new opportunity
- Discovering opportunities you already know about
- 20 questions to ask the customer to collect information about the opportunity
- How to “shape” the opportunity and influence the requirements legally
- Why and how to vet your proposed solution



- How to communicate effectively with your BD organization
- What to expect from your BD organization
- What information and help your BD organization will need from you
- Follow up process: What happens next?
  - Contract modifications
  - Presentations
  - Portability of work to other contracting vehicles
  - White papers exploring the problem and best practices for its solutions
  - Unsolicited proposals with company’s solution
  - Capture effort initiation

## **Day 2**

### *Module 4: Intelligence Gathering for Project Personnel*

- What information your BD organization needs, and why
- Guide to collecting intelligence during project execution onsite
- How to collect intelligence at the site visits, proposal conferences, and industry days
- How to distill information from customer presentations and reports, information from end users, the opportunity background and history, and research
- Rules on how to gather information ethically to keep the company out of trouble

### *Module 5: How to Contribute to Win Strategy*

- Understanding the components of a solid win strategy, and how project personnel can help contribute to developing a solid win strategy
- How to win as an incumbent or how to beat an incumbent
- What are win themes
- How win themes can figure into your win strategy sessions, and how to change your win strategy into a list of cohesive action items





## OST GLOBAL SOLUTIONS

### *Module 6: Competitive Analysis for Project Personnel*

- Avenues for the project personnel to identify competitors, gather competitive intelligence, and determine their strengths and weaknesses
- The types of action items project personnel could undertake to stay ahead of the competition

### *Module 7: Assisting in the Team Formation Process*

- Basics of teaming:
  - Why team and when one should team
  - Forms of teaming



- Teaming strategies
- What to look for in a teaming partner
- NDAs and Teaming Agreements
- How project personnel can help the BD organization with forming a formidable team

### *Module 8: Contributing to Solution Development*

- Contributing effectively to the solution development, win strategy sessions, and other BD organization-driven workshops

### *Module 9: Summary and Recap*



## FOUNDATIONS OF PRICING AND ESTIMATING

This two-day seminar covers the overall process and specific methods for estimating costs in activities common to most Federal, State and Local IT contracts.

Presentations concentrate less on theory and more on practical lessons. The instructor guides students through the process of developing the data, the estimates, the supporting rationale, and the evaluation of these estimates through a combination of classroom and practical exercise.

### Learning Objectives

Upon course completion, the participants will have learned and be able to put into practice:

- How to read the RFP for cost estimating requirements and parameters
- What information you have to get from your organization and proposal team
- How to develop a WBS and define the scope of work
- The available cost estimation methods and how to select the right one for any WBS item
- What makes a quality BOE and how to evaluate it
- How to properly document and present BOEs in your cost volume

### Course Curriculum

#### Module 1: Introduction

- Cost estimation in context of system life cycles
- Importance of cost estimation in project planning
- How estimation fits into the proposal cycle
- The link between cost estimation and scope control
- History of parametric modeling

#### Module 2: Scope Definition

- Creation of a technical work scope
- Definition and format of the Work Breakdown Structure (WBS) as a basis for accurate cost estimation
- Pitfalls in WBS creation and how to avoid them
- Task-level work definition
- Class exercise in creating a WBS.

#### Module 3: Cost Estimation Methods

- Different ways to establish a cost basis, with explanation of each:
  - parametric estimation,



### Training length:

1 day (1 unit)  
Certification Program

### This course is for:

- Executives and Managers
- Capture Managers
- Proposal Managers
- Financial Managers
- Project Personnel

### Course materials:

- Slides
- CD with process maps, templates, forms, and checklists

### Additional information:

service@ostglobalsolutions.com  
301-384-3350 (US, EST)  
www.ostglobalsolutions.com





- activity-based costing, analogy,
- case based reasoning,
- expert judgment,
- Etc.
- Benefits and detriments of each
- Industry validated applications
- Schedule estimation coupled with cost estimation
- Comprehensive review of cost estimation tools

#### *Module 4: Economic Principles*

- Using economies/diseconomies of scale, productivity, reuse, earned value, learning curves and prediction markets to illustrate additional methods that can improve cost estimates

#### *Module 5: System Cost Estimation*

- Estimation in software, electronics, and mechanical engineering
- Systems engineering estimation, including design tasks, test & evaluation, and technical management
- Percentage-loaded level-of-effort tasks: project management, quality assurance, configuration management
- Class exercise in creating cost estimates using a simple spreadsheet model and comparing against the WBS

#### *Module 6: Risk Estimation*

- Handling uncertainties in the cost estimation process
- Cost estimation and risk management
- Probabilistic cost estimation and effective portrayal of the results
- Cost estimation, risk levels, and pricing
- Class exercise in probabilistic estimation

#### *Module 7: Decision Making*

- Organizational adoption of cost models
- Understanding the purpose of the estimate (proposal vs. rebaselining; ballpark vs. detailed breakdown)
- Human side of cost estimation (optimism, anchoring, customer expectations, etc.)
- Class exercise on calibrating decision makers

#### *Module 8: Course Summary*

- Course summary and refresher on key points
- Additional cost estimation resources



## PROPOSAL EDITING WORKSHOP

The polished, professional appearance of your proposal is paramount to making a positive impression on evaluators. Every proposal needs an editor to get it in the customer-ready shape. Unlike regular editing, however, proposal editing requires skills that normally take a long time to master by trial and error—unless you take this course. It covers everything from developing the professional attributes of an editor, to estimating your workload correctly, figuring out the optimum workflow, integrating changes, and adding value to the content you’ve edited through incorporating compelling language. It will help you remove irrelevancies and puffed-up text, sniff out showstopper mistakes, translate ugly “proposalese” and “technicalese” to proper English, and enforce consistent style.

You will learn how to work with subject matter experts (SMEs) and edit their content to meet proposal requirements. You will practice editing for clarity and meaning, sharpen your ability to spot factual errors and redundancies, and organize unfocused materials. You will also learn how to infuse a consistent voice throughout your proposal regardless of the number of authors involved. This is a hands-on workshop filled with examples and that will help you master techniques for rapid and accurate editing using the available tools.

This interactive two-day workshop is 40 percent lecture, 50 percent exercises, and 10 percent discussion. It will teach you the real skills required to increase quality, professional appearance, and persuasiveness of your proposals.

### Learning Objectives

The participants will learn and practice skills in:

- Understanding a proposal editor’s role and key attributes
- Understanding compliance
- Assessing material and estimating resources required to edit sections
- Optimizing editing time and workflow in a team of editors to save resources
- Using electronic editing tools and professional hard copy markings
- Avoiding typical editing traps and mastering editing techniques to ensure a perfectly clean copy
- Editing content for clarity, compliance, customer language, accuracy, and persuasiveness
- Editing for content while preserving author’s meaning
- Improving the substance of the proposal
- Reducing page count without sacrificing content
- Adhering to the requirements of the Plain English Act
- Automating proposal editing to increase efficiency
- Editing resumes and past performance for length and compelling, relevant language
- Catching showstopper mistakes
- Improving readability while satisfying technical evaluators
- Effective workflow tracking



This is a Major and Elective Course for Bid & Proposal Academy

### Training length:

2 days (2 units)

### This course is for:

- Proposal editors
- Proposal writers
- Proposal managers
- Proposal coordinators
- Volume leads
- Proposal center directors
- Capture managers
- Desktop publishers
- Project personnel

### Prerequisites:

Core curriculum courses or familiarity with proposal development

### Course materials:

- Course workbook
- Handouts
- CD with templates

### Additional information:

service@ostglobalsolutions.com  
301-384-3350 (US, EST)  
www.ostglobalsolutions.com





## Course Curriculum

### Day 1

#### *Module 1: What it Takes to Be a Stellar Proposal Editor*

- Introductions and learning objectives
- The proposal editor's role in the proposal lifecycle
- Attributes of a great proposal editor
- Mastering diplomacy, providing constructive feedback, and fostering teamwork
- How an editor can have the greatest impact on proposal quality

#### *Module 2: Setting Up for Success*

- Introduction to styles: working with GPO, Chicago, and other style guides
- Checking what style is used for the proposal
- Creating a proposal-specific style guide for the proposal team
- Understanding compliance—how to quickly grasp the structure of the solicitation
- **Exercise:** Customizing style guide template for your proposal team.

#### *Module 3: Estimating Your Effort and Time*

- Identifying different levels of editing
- Assessing the material for content, organization, and writing style
- Skills and effort that different levels of editing require from a proposal editor
- Estimating time and effort required to edit the assigned workload
- Optimizing editing time to save resources while achieving the most professional results
- Determining workflow when working in a team of editors
- **Exercise:** Estimate the time required to edit the assignment and plan your work.

#### *Module 4: Editing Mechanics*

- Using MS Word's *Track Changes* and *Compare Documents* tools effectively
- Developing a systematic approach to electronic editing
- Tracking and merging changes by multiple reviewers
- Editing electronic section copy: secrets to clean and clear editorial feedback
- Editing hard copy: professional editorial markings glossary
- Microsoft Word shortcuts for increased speed and efficiency
- Typical editing traps and how to avoid them
- Four additional editing techniques to ensure a perfectly clean editing copy
- **Exercise:** Practice and compare the application of two different techniques to demonstrate a difference in editing quality.

#### *Module 5: Substantive Editing*

- Maximizing clarity and compliance with the outline and RFP
- Reintroducing RFP and customer's language
- Identifying and eliminating irrelevant boilerplate
- How to avoid distorting author's meaning
- Flagging inconsistencies, incomplete information, and ambiguity
- Adding benefits and proof language to improve persuasive qualities of the proposal
- Translating "technicalese" to English: correcting imprecise wording, technical arrogance and lecturing, redundancy, garbled language, confusing thoughts, unknown acronyms, and incomplete information
- Spotting and correcting factual inaccuracies that could kill your section's rating
- Pinpointing areas that need work
- Revising or reorienting figures and tables
- **Exercise:** Edit section for content.



**Day 2***Module 6: Structural Editing*

- How to cut down the text length to fit within the assigned page limit without sacrificing content
- Editing for better section flow
- Restructuring for more persuasive and proportionate paragraph flow
- Revising introductory sentences
- Organizing unfocused material
- Revising for consistent voice even if multiple writers contributed to proposal development
- Properly introducing figures and tables
- **Exercise:** Edit section for length and structure.

*Module 7: Copy Editing and Proofreading*

- Plain English Act's impact on proposal writing and editing
- Four editing automation techniques to increase editing speed and leverage modern editing tools
- Using spelling and grammar tools effectively
- Making global changes and using *Find and Replace* effectively
- Techniques to improve proposal readability while satisfying technical evaluators
- Eliminating passive voice, or deciding if and when passive voice is appropriate
- Identifying vague, redundant, or overused words or expressions
- Grammar gaffes every proposal editor should heed
- Grammar and punctuation refresher for the most common proposal errors
- Making finer adjustments such as tone and rhythm
- Editing, titling, and captioning figures and tables for maximum impact



- Ensuring consistency in style for every occurrence
- **Exercise:** Copy-edit the section for sentences and words.

*Module 8: Editing Resumes and Past Performance Sections*

- Rules for cutting proposal resumes to the right page count
- Editing past performance sections for compliance, relevancy, length, and consistency
- Workflow tracking tools to ensure you are always organized
- Working with authors to provide the missing information
- **Exercise:** Edit resumes.

*Module 9: Last Touches*

- Ten items to check in a proposal for consistency and professional appearance
- What to look for when editing for aesthetics to catch desktop publishing errors
- Techniques for finalizing the copy
- Comparing hard copy edits to the final document to ensure all changes are made correctly and no new errors are introduced
- Generating an acronyms table using modern tools
- Checking on numbering for figures and tables, and cross-references
- Cleaning up style sheets for fast and reliable formatting
- Generating or updating the table of contents
- **Exercise:** Identify the items requiring correction prior to proposal production.

*Module 10: Recap and Summary*



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## **DETAILED DESCRIPTIONS AND CURRICULA**

# **SELF-STUDY COURSES AND PROFESSIONAL TOOLS**



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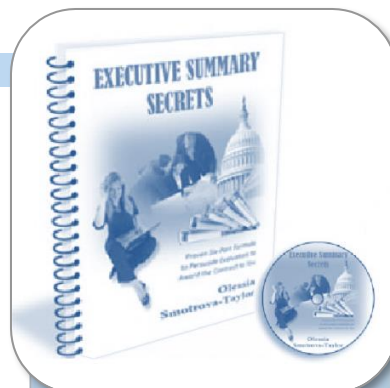
## EXECUTIVE SUMMARY SECRETS

### Workbook and Audio CD

This proven six-part formula will help persuade evaluators to award the contract to you. The executive summary the most important mechanism available to the writer for persuading the government to by you services. This course will teach you the concepts necessary for developing strong executive summaries. The course gives you a multitude of tips and tricks for each step of the process, which stem from lessons learned over more than a decade of experience in the field. Having all of this information in one place will prevent you from making those same mistakes yourself. This is an entire system designed to persuade the evaluators to award you the contract. It is like having a \$350-an-hour capture and proposal consultant next to you telling you all the insider secrets of how the top federal contractors win proposals.

### Course Curriculum

- *Three dangerous misconceptions that may be hurting your win rates*
  - Five key questions and answers to preparing persuasive executive summaries that sells
  - Why have an executive summary in the first place
  - Who should write an executive summary and when it should be written
  - What are the characteristics of a compelling executive summary
  - How to go about writing it – you don't have to battle with writer's block
- *Proven 6-part formula that makes the process simple and straight-forward*
  - 8 techniques for starting your executive summary so that you will never have to resort to "we are pleased to submit..."
  - Detailed instructions for writing compelling value proposition - or your main proposal win theme - so that your proposal truly sells
  - Most effective ways to introduce you and your team to convince the evaluators you are the best possible offer or for the job
  - Four ways to write the body (the main text) of your executive summary—with considerations of how to choose what works best for the specific proposal - no matter if it is a five-pager or a multiple-volume response.
  - Creative ways to develop a roadmap to your proposal - and how to decide when you don't need to include a roadmap
  - Techniques to develop a high-impact ending for your executive summary to make it even more persuasive, borrowed from the discipline of "direct response marketing"—as applicable and appropriate in government proposals
- *Executive Summary outline you can use repeatedly so that you never have to start with a blank page and wonder what to write*
- *Detailed guidelines for conceptualizing executive summary graphics*
  - How to conceptualize effective executive summary graphics - with ideas you can use on your next proposal
  - Executive Summary graphics dos and don'ts
  - Where to place graphics in the executive summary for the greatest impact
- *Techniques for editing your executive summary, so that your executive summary is polished -to create a favorable, highly professional impression.*



### Course format:

Workbook and audio CD

### This course is for:

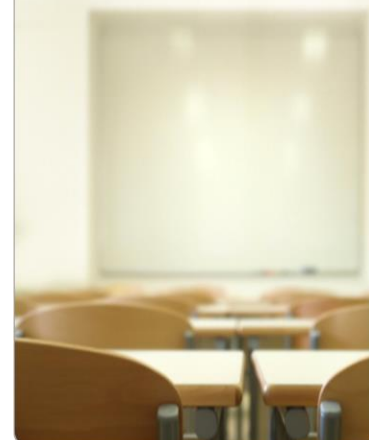
- Proposal Managers
- Proposal Writers
- Business Owners
- Project Personnel

### Where to order or learn more:

<https://ostglobalsolutions.com/executive-summary-secrets-2>

### Additional information:

service@ostglobalsolutions.com  
301-384-3350 (US, EST)  
www.ostglobalsolutions.com





OST GLOBAL SOLUTIONS

## PROPOSAL MANAGER'S ESSENTIAL CHECKLISTS

### Reusable professional toolset

*Make your job less stressful and your successes repeatable by using this set of checklists for every key stage of the proposal process*

Process problems arise because even the most sophisticated companies have an insufficiently defined approach to proposal management that lacks the most basic and necessary tools: a set of checklists for every major proposal phase.

To help make your job less stressful and your successes repeatable, we have developed a set of checklists for every key stage of the proposal process:

- RFP analysis and pre-Kickoff preparation
- Data calls and day-to-day management
- Advance preparation for reviews and tasks immediately before and after the review
- Proposal printing and proposal delivery

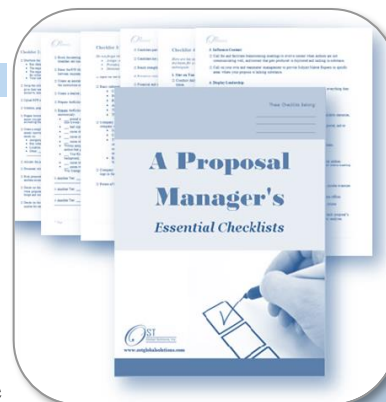
This set of heavy-duty laminated checklists that you can reuse with a dry-erase marker (included) will help you with every proposal you run. It comes in a three-ring binder that you can easily personalize. It includes blank tabs, enabling you to add your own reusable materials such as team contact information, additional checklists, even the local food delivery menus. These checklists are an indispensable tool for anyone involved in proposal management or coordination.

This toolset will take proposal management to the level of practical implementation - showing you exactly what you need to do, so you can manage a proposal of any size and duration confidently and successfully. They are based on the latest best practices from the top government contractors, and will work for any company - small or large no matter what process your organization uses.

It took us years of lessons learned to develop and test-drive these checklists, and now you can benefit from this work. You will easily make this money invested in purchasing this back with the first pursuit you run, saving countless hours for you and your team not having to wonder how to get started, and not having to encounter problems that could happen because of a single missed step.

#### These checklists will enable you to:

- Increase your confidence as a proposal manager or proposal coordinator
- Reduce stress, as you will not have to experience the consequences of steps missed in your proposal process
- Make your successes repeatable, and enable you to continuously improve your performance
- Raise your professionalism level by gaining exposure to the best-practices-based toolset, and get noticed by your management, teammates, and others, commanding more respect and higher pay
- Increase your win rates, because a better organized proposal is likely to yield a more competitive document



#### Format:

Laminated dry-erase reusable checklists in a three-ring binder

#### This tool is for:

- Proposal Managers
- Proposal Writers
- Business Owners
- Project Personnel

#### Where to order or learn more:

<https://ostglobalsolutions.com/proposal-managers-essential-checklists>

#### Additional information:

service@ostglobalsolutions.com  
301-384-3350 (US, EST)  
www.ostglobalsolutions.com





## PROPOSAL RESOURCES ESTIMATING GUIDE

### Professional toolset-reference

#### *Plan and track proposal resources with confidence*

Use our guide for determining the required manpower and hours to calculate how much a proposal should cost. This is a handy reference for capture managers, proposal managers, division directors, and business owners to help estimate, plan, and track proposal resources.

For many, proposal estimating is full of guesswork.

- How do you know how many hours it would take you to develop a quality proposal?
- How do you know if an estimate is reasonable or unreasonable?
- How do you make sure that you are not set up for failure with an estimate that is entirely too low, or how do you know if you are not wasting money on a proposal and jeopardizing your return on investment (ROI)?

OST Global Solutions uses this guide internally to estimate our efforts and create consulting proposals to our customers. It came from years of collecting best practices and metrics, and vetting this information by the proposal field's leading professionals to ensure accuracy.

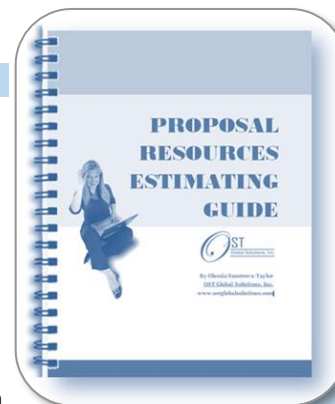
#### **The guide includes:**

- Three methodologies for proposal estimating, to “triangulate” a highly realistic estimate that does not lower your proposal ROI
- Guideline for how long it takes to create different proposal elements that involve technical writing, resume and past performance references development, different types of editing and graphics development, desktop publishing, and production. These charts include the scope for each proposal role, and variables to take into consideration to ensure your estimate is tailored to your specific circumstances
- Methodology for translating time into dollars, regardless of whether you use internal employees or hire consultants
- Methodology for tracking the time spent on your proposal, to manage resources to their estimates

You will get immediate ROI on the very first pursuit where you use this guide.

With this guide you will be able to:

- Quickly calculate proposal needs
- Reduce stress through more realistic resources and schedule
- Eliminate waste of resources through more careful budget tracking
- Make better use of your limited resources by deciding to bid (or not) on different proposals
- And, most importantly, resource your proposals to win



#### **Format:**

Workbook

#### **This tool is for:**

- Proposal Managers
- Capture Managers
- Proposal Coordinators
- Proposal Consultants
- Proposal Writers
- Business Owners

#### **Where to order or learn more:**

<https://ostglobalsolutions.com/proposal-resources-estimating-guide-2>

#### **Additional information:**

service@ostglobalsolutions.com  
301-384-3350 (US, EST)  
www.ostglobalsolutions.com







OST GLOBAL SOLUTIONS

# HOW TO SUCCEED AS A PROPOSAL CONSULTANT

**5-hour video course and pdf slides**

*Get more work, higher pay, and better clients*

This four-class video course with more than five hours of material shows you how to succeed as a consultant in the field of capture management, proposal management and coordination, proposal writing, graphics, desktop publishing, editing, orals coaching, and related proposal professions.

Complete, immediately applicable system for winning large contracts and growing your footprint in the federal market consistently.

## Course Curriculum

### Session 1

- Roadmap to successful proposal consulting
- Pros and cons of consulting versus working for a company
- How to start your consulting business and make the transition from full-time job easier
- How to set your rates (what are the going rates in the industry)
- How to determine your marketable skill sets, regardless of whether you are just starting out or have been a consultant for a while
- 10 ways of billing clients and the secrets for finding work, quickly
- How to plan for, negotiate, or even avoid traveling for your consulting jobs
- What are the IRS rules about consultants and how "what you don't know" will hurt you
- How to set up your own insurance, benefits, and other necessities
- The skinny on proposal companies brokering independent consultants
- The pros and cons of working with a broker versus working directly with companies
- The ins and outs of negotiating contracts
- How to avoid being bogged down in busy work of bookkeeping, etc.
- What tools and technology will make your life easier
- Strategies for growing your consulting business

### Session 2

- Common marketing mistakes and how to market effectively on a tight budget
- Collateral and credentials you have to develop to get better jobs and higher rates
- How to expand your marketable skills and whether to give your win rate
- How to determine if you need a website, how to set it up and manage it inexpensively
- How to ensure your prospective customers can find you on Google
- How to leverage article marketing and other low-cost marketing activities
- An important technique that will enable you to plan better, get more clients, and stop worrying about getting your next job



### Course format:

Instant electronic download or printed and recorded version

### This course is for:

- Proposal Consultants
- Proposal Managers
- Capture Managers
- Business Developers
- Proposal Writers
- Business Owners

### Where to order or learn more:

<https://ostglobalsolutions.com/succeed-proposal-consultant>

### Additional information:

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301-384-3350 (US, EST)  
www.ostglobalsolutions.com





### *Session 3*

- How to avoid undercharging for your services
- 3 most common problems that lead to low rates and signs of them
- 5 proven techniques for getting your rates up and how to negotiate better
- Consultant's ethics, code of conduct, and how to handle difficult clients

- How to prevent clients questioning your charges and bills, or paying late or not at all
- How to handle overlapping assignments where you have to juggle multiple proposals, calls from multiple brokers, and periods of drought

### *Session 4*

- Q&A session that delves into the topics above in greater depth.



OST GLOBAL SOLUTIONS

## BLUEPRINT FOR FEDERAL BUSINESS DEVELOPMENT

### Comprehensive system for winning business with 30-hour videos, detailed manuals and processes maps

This course is available as a whole 12-module course, or you can purchase modules individually as you need them.

This course is an opportunity for you to get instruction in a complete, immediately applicable system for winning large contracts and growing your footprint in the federal market consistently.

This self-study course covers everything from basic to advanced topics. It takes you through the entire lifecycle of business development: strategic planning, market research, pipeline development, opportunity identification, capture management, proposal management, and implementation, helping you launch your company into aggressive growth in the government market.

This course:

- Covers the foundations on how to focus and jump-start your growth effort, helps find specific opportunities, and attracts customers to you
- Shows you exactly how to position yourself pre-proposal so that your win probability is near 90% before the Request for Proposal (RFP) ever hits the streets
- Provides a clear process for preparing winning proposals
- Reveals techniques even most seasoned federal contractors often fail to leverage

You will get the blueprint for growing, all the checklists, instructions, processes, tools, and all the other resources that you need to expand your company in the federal space. This Blueprint has everything you need to take your existing government contracting business to another level or to get started in the federal market.

### Course Curriculum

#### Part I

#### How to Focus and Jump-Start Your Business Growth Effort

##### Module 1

- Overview of the Blueprint, introducing key success components companies use to grow aggressively
- Introduction to the government market from an insider's viewpoint so that there is no mystery at all as to how companies win business from the government consistently

##### Module 2

- How to develop a strategic plan and perform market research that feeds this strategic plan



#### Course format:

Instant electronic download or printed and recorded version of 12 modules (each module includes 1.5 hour lecture video presentation, 1 hour Q&A video session, manual, slides, and reusable processes maps)

#### This course is for:

- Business Owners
- Sales Executives
- Capture Managers
- Proposal Managers
- Proposal Writers
- Project Personnel

#### Where to order or learn more:

<https://ostglobalsolutions.com/blueprint-Federal-business-development-2>

#### Additional information:

service@ostglobalsolutions.com  
301-384-3350 (US, EST)  
www.ostglobalsolutions.com





## OST GLOBAL SOLUTIONS

- How to leverage 5 most effective techniques for marketing to the feds—without spending a fortune

### Module 3

- How to find opportunities in the federal market that are tailor fit to your company
- How to determine early which opportunities are perfect and which ones are a waste of time and money

## Part II

### Capture Planning To Position You to Win Before the RFP Is Issued

#### Module 4

- How to create strong and lasting relationships with your government customers to learn about their true care-about, worries, challenges, mission drivers, and buying criteria—and to get them to want to choose you

#### Module 5

- How to gather actionable intelligence—as it is absolutely true that "the best informed wins."
- How to develop great win strategy and win themes to prepare you to finish on top, so that writing your proposal and winning is a straight shot

#### Module 6

- How to analyze your competition so that you could exploit their shortfalls to your advantage and outdo them through strategic actions
- How to choose and engage the right companies to create a team that compels the customer to select you

#### Module 7

- How to develop proposal solution for pre- and post-draft RFP that will wow your customer and put your proposal in a whole different league
- How to manage your capture effort effectively while conserving your resources



## Part III

### How to Prepare Winning Proposals

#### Module 8

- Gain understanding of why proposals win (and why many don't)
- Make an educated decision to bid or not bid on a proposal
- Analyze and shred the RFP
- Develop a proposal schedule to deliver on time

#### Module 9

- How to create a compliant proposal outline that helps get the highest score from evaluators
- How to integrate your proposal document upfront

#### Module 10

- Key elements of a winning government proposal
  - Executive summary
  - Proper format for past performance and resume sections
  - Graphics
- How to use persuasive language to convince the evaluator to award the contract to you

#### Module 11

- How to run effective proposal reviews
- How to polish your proposal
- How to produce and deliver it on time

## Part IV

### Techniques for Building and Growing Your Business Development Operation

#### Module 12

- How to grow contracts even after you have won the work
- How to expand your footprint and add scope to your contract
- How to create a bid engine that catapults your company into aggressive growth



OST GLOBAL SOLUTIONS

## TASK ORDER MANUAL TEMPLATE

### Professional reusable professional toolset

*Organize your indefinite delivery/indefinite quantity (IDIQ) team to dominate the competition and maximize your return on investment by consistently winning task orders*

A well-written Task Order Manual for an IDIQ vehicle can work wonders. It is a living document that contains all the most important information and strategies for your IDIQ, including procedures on how you assign Task Order work, how Task Orders get evaluated, what presentation approaches will win for this particular customer, where to find all the important data for this IDIQ, and other vital information. The Task Order Manual encapsulates all the operational rules, puts the whole team on the same page, and sets the foundation for the IDIQ winning machine.

It answers some important questions, such as:

- What are the IDIQ patterns, so that you can crack the code of each contracting vehicle you are on and win repeatedly?
- How will your teammates be allowed to interact with the government customer? Can they talk with the customer directly or do they have to go through you? What if they send a message about your team that is contrary to your strategy? Can they bring work to the vehicle by talking directly to the customer? How will you deal with frenemy companies, i.e. your non-exclusive subs?
- What are the marketing rules of engagement your teammates will abide by when talking to the customer, and how do you create a unified customer message?
- What processes will your team follow for business development, capture, and proposal development in an environment where it is hard to talk to the customer, and you don't find out much until a Task Order request for proposal drops?
- How will everyone stay organized and know what to do when time is of the essence?

We have developed a Task Order Manual Template to help you dominate your IDIQ competition. This is a 52-page, detailed document that not only provides the format and the words to put in your own Task Order Manual, but also gives directions on how to tailor it further to your needs. It offers insights into best practices in winning Task Orders, provides examples, and explores various scenarios to make it fit different IDIQ vehicles you may encounter.

It took us countless hours to develop this Manual, and it encapsulates years of lessons learned from those who have built winning IDIQ machines and closely watched the top Government contractors' best practices. It will save you time and learning through mistakes, and will help win millions of dollars in Task Orders.

**Download it instantly in electronic format so that you can start tailoring it right away on your IDIQs, to organize your work and maximize your Team's Pwin for Task Orders.**



### Format:

Instant download, electronic Word template

### This tool is for:

- Proposal Managers
- Capture Managers
- Proposal Coordinators
- Proposal Consultants
- Proposal Writers
- Business Owners

### Where to order or learn more:

<https://ostglobalsolutions.com/task-order-manual-template-2>

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## SIX STRATEGIES TO GROW AGGRESSIVELY IN THE FEDERAL MARKET

**Video course (with pdf slides)**

### *Achieve triple-digit growth and higher win rates*

If you manage a small government contracting business, you are one busy person. Like many other CEOs and senior executives, you still may be billable on government contracts, write proposals in your “free” time, and run daily company operations on top of that. If you are not building a lifestyle business meant to remain small, you may feel pangs of frustration by the way things are going.

Can you relate to any of the following problems commonly reported by small businesses?

- Lack of a clear strategy to take the company to the next level of growth where the revenue comes at a consistently increasing rate.
- Majority of business comes from subcontracting to others.
- Bidding only on a handful of proposals a year, and having a low win rate to boot.
- Lack of good personnel, processes, or tools for business development.

If your company faces any of the common issues above; if you would like to learn how to change your predicament, and perhaps one day make it to the Fast 50 list yourself; if you want to finally have the time to focus on critical business-building tasks; you will find this video course for CEOs and senior executives of small to mid-tier government contracting businesses very useful for you and your company.

### **This information-packed class covers the following topics:**

- Why some companies make the Fast 50 list while others settle for slow growth or end up struggling for survival.
- How small businesses in the government market plan their growth with laser precision, prolonging their small business program benefits for as long as possible, and get better prepared for the tough mid-tier environment.
- What growth rate a healthy government contractor should aim for at various stages of development.
- Four revenue-boosting categories of action for growth that all companies have to take.
- The formula for determining how many government pursuits a healthy company should bid on monthly and annually.
- Specific steps for building up your business development, capture, and proposal organization, and metrics for optimizing it to achieve your desired growth rate.
- Six specific strategies to help your company grow aggressively in the federal market and avoid being stuck in the same place for years.



### **Course format:**

Instant electronic download or printed and recorded version

### **This course is for:**

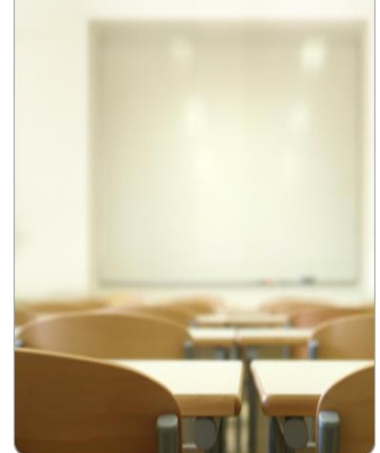
- Business Owners
- CEOs
- Business Developers
- Proposal Managers
- Capture Managers
- Business Developers

### **Where to order or learn more:**

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### What our customers say:

*"This was extremely useful in assisting me to make the right decision in building my company's BD process. It validated much of what we have been attempted to build, but it really brought all the essential aspects of Capture Management into Focus."*

John R. Morrison, Sr. VP of Operations, CES

S

*"OST Global Solutions classes and webinars hit the mark every time. The curriculum is focused on the needs of business development professionals in a hyper-competitive marketplace. They not only identify the most common pitfalls, but also demonstrate in detail just how to write winning proposal sections."*

Ciro Pinto-Coelho, Director, Strategy & BD, Raytheon Company

*"A wealth of information delivered in a very short time in a very engaging fashion. After 3 years in a company that focuses on federal contracting, I became a proposal manager. I have a wonderful team, but none of us have had much formal proposal training. I'm definitely recommending these courses for a number within our company."*

Christopher J. Sparks, Proposal Manager, Skyline Ultd, Inc.

*"The proposal training class is really good. Probably one of the best classes I have attended in years. The instructor is well prepared and knows her stuff. The course is packed with content and we barely had time for breaks; but I really did not feel the need to stop. Wish you were here!"*

Brian Giroux, FLIR Government Systems

*"Your Writing Persuasive Federal Proposals workshop was great! Your tips and techniques are invaluable and I'll certainly be taking them back to my team.*

*Where I was hesitant and slow to start writing, this workshop gave me the confidence boost and technique to jump right in fearlessly. I'm sure my team will appreciate the depth of my writing and in half the time! Thanks!"*

Constance S. Dyson, MBA, AM.APMP, Proposal Coordinator, SAIC





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