

## APMP Syllabus for OTE Practitioner Examination

<b>Syllabus Area Code IM</b>		<b>Syllabus Area:</b> <b>Information Research, Management and Sales Orientation (IM)</b>		
<b>Able to apply and adapt the APMP Information Research, Management and Sales Orientation competencies to a given proposal/bid scenario.</b> <b>Specifically to:</b>			<i>APMP Draft V3.0 Syllabus competencies</i>	<i>APMP BoK topic</i>
03	01	Identify the information required to complete an opportunity management plan	Information Gathering	Opportunity Plan Knowledge Management
03	02	Create a plan to gather the information required, appropriate for the time available, <ul style="list-style-type: none"> <li>• The customer</li> <li>• The competition</li> <li>• Capability, including resource</li> <li>• Tool(s) to store information</li> </ul>	Information Gathering Knowledge Management	Opportunity Plan Management / Customer Analysis and Competitive Analysis
03	03	Identify where and how the sales process interfaces with the business winning life cycle	Sales Participation	Opportunity Management, Customer Relationship Management Introduction to the Business development Life Cycle End-to-End Process
<b>Able to identify, analyse and distinguish between appropriate and inappropriate application of the APMP Information Research, Management and Sales Orientation competencies to a given proposal/bid scenario.</b> <b>Specifically to:</b>				
04	01	Whether appropriate actions have been taken, and responsibilities assigned when interfacing and communicating with internal clients and external customers	Customer Interface Management	Customer Relationship Management and Opportunity Plan Management
04	02	Whether the relationship between an opportunity plan and the proposal is clear and the strategy within the opportunity plan can be used to drive proposal strategy and messaging	Opportunity Plan Development	Linking Opportunity Plans with Proposal Content – Enhance BOK
04	03	Whether appropriate actions and responsibilities to facilitate the development and promotion of a win strategy have taken place, and that the win strategy has adapted to meet changing circumstances	Winning Strategy Development	Opportunity Plan Management / Win Strategy Enhance BoK (in opportunity Management as actions)
04	05	Whether appropriate actions have been taken within the sales process	Sales Participation	Opportunity Management, Customer Relationship Management Introduction to the Business development Life Cycle End-to-End Process
<b>Syllabus Area Code PM</b>		<b>Syllabus Area:</b> <b>Planning and Management (PM)</b>		
<b>Able to apply and adapt the APMP Planning and Management competencies to a given proposal/bid scenario.</b> <b>Specifically to:</b>			<i>APMP Draft V3.Syllabus competencies</i>	<i>APMP BoK topic</i>
03	01	Develop a proposal schedule, including: <ol style="list-style-type: none"> <li>1. resourcing requirements</li> <li>2. scheduling metrics</li> </ol>	Schedule Development Risk Management	Scheduling End to End Process Budgets Scheduling

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		<ol style="list-style-type: none"> <li>3. activities and reviews</li> <li>4. customer's timescales</li> <li>5. cost estimate</li> <li>6. risk</li> <li>7. contingency</li> </ol>	Production Management	Production Management Managing External Risk Managing Internal Risk
03	02	Identify appropriate actions, roles and responsibilities when undertaking document reviews	Review Management Lessons Learned Analysis and Management	Review Management Lessons Learned Analysis and Management
03	03	Identify appropriate actions and responsibilities when managing risk management strategies for: <ol style="list-style-type: none"> <li>1. proposal development</li> <li>2. solution</li> </ol>	Risk Management	Managing External Risk Managing Internal Risk
03	04	Identify appropriate content of progress reports <ul style="list-style-type: none"> <li>• schedule changes</li> <li>• resource changes</li> <li>• issues requiring resolution</li> <li>• Possible need to revisit qualification</li> </ul>	Report Management	Scheduling Daily Team Management Stakeholder Engagement and Management
03	05	Identify the appropriate actions and responsibilities when planning and scheduling infrastructure and time required for proposal production, including appropriate selection of document styles, formats and visuals	Production Management Page and Document Design	Scheduling / Production Management Page and Document Design
03	06	Identify appropriate actions and responsibilities to support the key elements of the proposal development process	Process Management	Scheduling End-to-End Process
03	07	Identify appropriate actions and responsibilities to manage a virtual proposal process team	Virtual Team Management	Virtual Team Management
<b>Able to identify, analyse and distinguish between appropriate and inappropriate application of the APMP Planning and Management competencies for a given proposal/bid scenario.</b> <b>Specifically to analyse with reasons:</b>				
04	01	Whether a proposal schedule is appropriate, and has adapted to reflect internal and external changes	Schedule Development	Scheduling
04	02	Whether document reviews have been undertaken appropriately to meet the size and type of opportunity and customer timescales	Review Management Lessons Learned Analysis and Management	Review Management Lessons Learned Analysis and Management
04	03	Whether risk management strategies have been applied appropriately	Risk Management	Managing External Risk Managing Internal Risk
04	04	Whether the proposal development process and activities have been carried out appropriately for the situation and opportunity	Process Management	Scheduling End to end process
04	05	Whether activities undertaken to manage a virtual proposal team are appropriate	Virtual Team Management	Virtual Team Management
<b>Syllabus Area Code DV</b>		<b>Syllabus Area: Development (DV)</b>		
<b>Able to apply and adapt the APMP Development competencies to a given proposal/bid scenario.</b> <b>Understand:</b>			<i>APMP Draft V3.Syllabus competencies</i>	<i>APMP BoK topic</i>
02	01	The process to establish an early winning price target and a winning	Winning Price	Price to Win

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		price strategy	Development	
<b>Able to apply and adapt the APMP Development competencies to a given proposal/bid scenario.</b> <b>Specifically to:</b>			<i>APMP Draft V3.Syllabus competencies</i>	<i>APMP BoK topic</i>
03	01	Identify the information required for an initial opportunity qualification decision	Opportunity Qualification	Gate Decisions End-to-End Process
03	02	Develop a quantified opportunity-specific value proposition that meets customer expectations, balancing value and price	Winning Price Development	Value Propositions
03	03	Determine suitable use of internal and/or external teaming partners, using appropriate tools, and facilitate the negotiation of teaming agreements <ul style="list-style-type: none"> <li>• Bidder Comparison Matrix</li> <li>• SWOT</li> </ul>	Teaming Partner Identification	Customer Analysis and Competitive Intelligence
03	04	Schedule and use analysis tools to identify and evaluate positive and negative discriminators to drive the development of proposal strategy statements	Proposal Strategy Development	Strategy and Win Themes Customer Analysis and Competitive Intelligence Proposal Strategy Development
03	05	Identify the principles and key elements required to develop a customer-focused executive summary	Executive Summary Development	Executive Summaries
03	06	Identify and develop the inputs required at a kick off meeting including: <ol style="list-style-type: none"> <li>1. Opportunity Summary</li> <li>2. Customer Profile</li> <li>3. Proposal Strategy</li> <li>4. Proposal Operations</li> <li>5. Proposal Schedule</li> <li>6. Proposal Outline</li> <li>7. Writers' Packages</li> <li>8. Bid Request</li> <li>9. Draft Executive Summary</li> <li>10. Competitive Analysis</li> <li>11. Roles and Responsibilities</li> <li>12. Work Breakdown Structure (WBS)/WBS Dictionary</li> </ol>	Kick Off Meeting Management	Kick Off Meeting Management
03	07	Identify the appropriate level of content planning required	Content Plan Development	Content Plans
03	08	Identify customer requirements and build a compliance matrix	Requirements Identification	Compliance and Responsiveness Compliance Matrix
03	09	Apply the principles and appropriate techniques of persuasive writing for different types of audiences, including the: <ol style="list-style-type: none"> <li>1. Principles of writing clearly</li> <li>2. Benefits of designing structured documents</li> </ol>	Persuasive Writing	Persuasive Writing Writing Clearly Proposal Organization
03	10	Coordinate, organize and assign appropriate use of graphics, including: <ol style="list-style-type: none"> <li>1. Customer-focused action captions</li> <li>2. Effectiveness of Illustration and action caption</li> <li>3. Highlighting benefits and discriminators</li> <li>4. Basic design principles</li> </ol>	Graphics Design	Graphics and Action Captions Page and Document Design Features, Benefits and Discriminators Headings

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<b>Able to identify, analyse and distinguish between appropriate and inappropriate application of the APMP Development competencies for a given proposal/bid scenario.</b> <b>Specifically to analyse with reasons:</b>				
04	01	Whether the bid decision process has been applied appropriately, using a consistent method/tool to qualify an opportunity	Opportunity Qualification Leadership	End-to-End Process Gate Decisions
04	02	Whether the value proposition presented to a customer is appropriate	Winning Price Development	Value Propositions
04	03	Whether the most appropriate teaming partner(s) have been selected by applying analysis tools: <ul style="list-style-type: none"> <li>• Bidder Comparison Matrix</li> <li>• SWOT</li> </ul>	Teaming Partner Identification	Customer Analysis and Competitive Intelligence
04	04	Whether a proposal strategy has been developed and assigned appropriately within the content plan	Proposal Development Strategy	Win Strategy and Themes
04	05	Whether an Executive Summary is fit for purpose	Executive Summary Development	Executive Summaries
04	06	Whether the content plan for a proposal is fit for purpose, contains the correct information to guide writers for its size and type, and has been developed appropriately	Content Plan Development	Content Plans Proposal Theme Statements, Win Strategy and Themes
04	07	Whether a compliance matrix is fit for purpose and has been used appropriately	Compliance Checklist Development	Gate Decisions Compliance and responsiveness
04	08	Whether appropriate persuasive writing techniques have been applied for a given audience	Persuasive Writing	Persuasive Writing
04	09	Whether the production and use of graphics is appropriate, including: <ol style="list-style-type: none"> <li>1. Customer-focused action captions</li> <li>2. Effectiveness of Illustration and action caption</li> <li>3. Highlighting benefits and discriminators</li> <li>4. Basic design principles</li> </ol>	Graphics Design	Graphics and Action Captions Page and Document Design Features, Benefits and Discriminators Headings
<b>Syllabus Area Code</b> <b>BA</b>		<b>Syllabus Area:</b> <b>Behaviour and Attitude (BA)</b>		
<b>Able to apply and adapt the APMP Behaviour and Attitude competencies to a given proposal/bid scenario.</b> <b>Specifically to:</b>			<i>APMP Draft V3.Syllabus competencies</i>	<i>APMP BoK topic</i>
03	01	Identify appropriate interpersonal styles and communication methods/media: <ul style="list-style-type: none"> <li>• interpretation of messages and responses</li> <li>• factors that affect the effectiveness of communication and potential barriers</li> <li>• Understand and interpret situational needs and desired outcomes</li> <li>• appropriate ways to interact with prospective customers in manner that builds effective relationships</li> </ul>	Communicating with others	Communicating with Others
03	02	Identify appropriate actions and responsibilities to check the quality of processes and tasks and take corrective action where necessary	Quality Orientation	Quality Management Project Management

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03	03	Identify appropriate actions and responsibilities to develop and use strategic relationships and a successful team	Building Strategic Relationships and a Successful Team	Stakeholder Engagement and Management Daily Team Management Virtual Team Management
03	04	Identify appropriate actions and responsibilities to ensure effective decision making and delegation	Decision Making and Delegating Responsibility	Stakeholder Engagement and Management Daily Team Management Virtual Team Management
<b>Able to identify, analyse and distinguish between appropriate and inappropriate application of the APMP Behaviour and Attitude competencies for a given proposal/bid scenario.</b> <b>Specifically to analyse with reasons:</b>				
04	01	Whether interpersonal styles and communication methods/media have been used appropriately	Communicating with others	Communicating with others
04	02	Whether corrective action has been taken appropriately to support and maintain the quality of processes and tasks	Quality Orientation	Quality Management Project Management
04	03	Whether actions taken to build strategic relationships and successful teams are appropriate	Building Strategic Relationships and a Successful Team	Stakeholder Engagement and Management Daily Team Management Virtual Team Management
04	04	Whether decision making and delegation processes has been undertaken appropriately	Decision Making and Delegating Responsibility	Stakeholder Engagement and Management Daily Team Management Virtual Team Management