

Bid/Proposal Manager Competency Self-Assessment and Personal Development Template

Introduction

About this document

This document addresses a sample of the competencies and the behavioural aspects of effective bid and proposal management. It has been prepared for demonstration purpose for use at the APMP Bid & Proposal Con in 2016.

This Competency Framework addresses the skills required by Bid/Proposal Managers.

The competencies are grouped into five categories, in the same way as the APMP's Body of Knowledge is categorised; each represent key practice areas for improving an organisation's business development focus:

- Understand business development
- Focus on the customer
- Create deliverables
- Manage processes
- Use tools and systems

The Report is only an indicator. Therefore, it is recommended that decisions on recruitment, promotion, career guidance and development are made in conjunction with other relevant information and not solely on the information in this report. The author accepts no responsibility for decisions made using this tool and cannot be held directly or indirectly liable for the consequences of those decisions.

Prepare an honest self-assessment of your competence

- A) **Confidence Score:** For each of the competence categories, read the description at the beginning of the category and give yourself a rating relating to your confidence in your abilities in that category. Rate your confidence on a scale of 1 to 3 where:

1. You have **limited confidence** in your abilities in this competency area.
2. You have **reasonable confidence** in your abilities in this competency area.
3. You are **confident** in your abilities in this competency area.

Then:

- B) **Competence Score:** For each of the competence categories, read the description of the competencies in each of the categories and give yourself a rating relating to your competence in that category. Rate your competence on a scale of 1 to 3 where:
1. You have **limited understanding**. You have some understanding of the concept or theory but have had little or no experience in applying to bids / proposals.
 2. You have a **good understanding** and have applied the concept or theory to bids / proposals that you have managed or participated in.
 3. You have **extensive understanding** and are able to apply it to your work and educate others in its application.

Transfer your results to the summary table

- C) For each of the competence categories:
1. Transfer your **confidence** score to the table.
 2. Transfer your **competence** score to the table.

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- D) For each of the competence categories, use the look up table to record the T, M, C or F into the final column of the summary table.

Record your development path on the PDP template

- E) For each of the development approaches, of Train, Mentor or Coach, group the competency categories and agree with the person responsible for your development the way in which you are best developed.

Self-Assessment of Competence

Understand business development

Competencies & Indicators	1	2	3
Sales Participation - To maximise wins, external focus on customers rather than on internal matters is required. Gaining customer's confidence and being able to influence customers requires a professional and sales driven approach and the ability to adopt the appropriate approach for different customers and situations.			
My confidence score for this competency area is:			
Extensive understanding (score of 3) means that I am able to: <ul style="list-style-type: none">• use different sales approaches adaptively to suit the organisation and the customer.• work with a sales team to influence the customer.• participate in sales strategy development.• think 'out of the box' and advise on the implications of different options available.• set organisational values when making decisions.• initiate and sponsor new ideas.			
My competence score for this competency area is:			

Focus on the customer

Competencies & Indicators	1	2	3
Executive Summary Development - development and production of a high level summary that reflects the Organization's win strategy, themes, overall content, in the format that the final proposal will have. The summary is distributed to the full team as guidance for writing.			
My confidence score for this competency area is:			
Extensive understanding (score of 3) means that I am able to: <ul style="list-style-type: none">• collaborate with Senior Manager to write an early draft of the Executive Summary.• conduct a high-level review.• use the Executive Summary as a bid / proposal briefing tool internally and externally.• review comments.• participate in the review and sign off of the final Executive Summary.• communicate complex concepts clearly and simply, verbally and in writing.• create and sustain inspiration, energy and focus.			
My competence score for this competency area is:			

Self-Assessment of Competence

Competencies & Indicators	1	2	3
Proposal Strategy Development - analysis of the customer, the business and the competitors to develop a strategy that is ethical, implementable and cost effective.			
My confidence score for this competency area is:			
Extensive understanding (score of 3) means that I am able to: <ul style="list-style-type: none"> • identify how the customer perceives the organisation. • identify the customer's perceptions of the competitors. • identify the +ve and -ve discriminators for the opportunity. • develop proposal statements in a what / how format. • assign proposal strategies to individual proposal sections. • coach others to define and use proposal strategy statements effectively. • communicate complex concepts clearly and simply, verbally and in writing. 			
My competence score for this competency area is:			
Winning Strategy Development - Analysis of the customer, the business and the competitors will drive the development of a strategy that is ethical, implementable and cost effective.			
My confidence score for this competency area is:			
Extensive understanding (score of 3) means that I am able to: <ul style="list-style-type: none"> • manage the bid / proposal win strategy and ensure full trace ability and rigour in defining the strategy. • ensure that the strategy is continually reviewed to reflect changing circumstances. • sell the strategy internally and to partners. • define and communicate a vision providing focus and energy for the sharing of knowledge. • create and sustain inspiration, energy and focus over time. 			
My competence score for this competency area is:			
Winning Price Development - The formulation and implementation of a winning price strategy. Pricing requirements vary by market and are unique to every organisation. A price target should be developed early in the bid by developing a view of the ultimate winning price. Throughout the bid that price target should be revisited and used to guide the solution offering and win strategy.			
My confidence score for this competency area is:			
Extensive understanding (score of 3) means that I am able to: <ul style="list-style-type: none"> • influence and implement a top-down pricing strategy to meet the winning price. • plan ahead to negotiating stage. • manage the process for the business case of the approval and sign-off. • define cost drivers and pricing. • think 'out of the box' and advise on the implications of the different options. 			
My competence score for this competency area is:			

Self-Assessment of Competence

Competencies & Indicators	1	2	3
Teaming Identification - Development of a strategy where two or more organisations agree to jointly pursue an opportunity either to improve their chances of winning or to decrease their chances of losing.			
My confidence score for this competency area is:			
<p>Extensive understanding (score of 3) means that I am able to:</p> <ul style="list-style-type: none"> • recognise the need for teaming partners. • identify the suppliers / partners required. • recruit partners and negotiate the agreements. • define and agree Statement of Work for teaming / partnering to meet the schedule. • engender confidence in the bid team, management, the customer and other relevant third parties. • make strategic decisions that affect the business longer term. • communicate complex concepts clearly and simply. • lead multiple teams balancing conflicts and interests. • create and sustain political coalitions to gain support and influence the outcome. 			
My competence score for this competency area is:			

Create deliverables

Competencies & Indicators	1	2	3
Requirements Identification - The ability to identify customer requirements within their documentation and identify and record requirements discussed in customer meetings. Understanding and identifying all requirements - whether documented, verbal, implied or implicit, allows a solution to be defined that best fits the customer's needs and price and provides the basis for developing a winning strategy.			
My confidence score for this competency area is:			
<p>Extensive understanding (score of 3) means that I am able to:</p> <ul style="list-style-type: none"> • identify and develop requirements collaboratively with the customer. • analyse Customer documentation and identify anomalies and redundancies. • identify and communicate clarification questions to the customer and their responses to the team. • access Senior Management and key stakeholders to lobby for appropriate SMEs. • build complex Requirements Matrices. • brief SMEs from Requirements Matrices. • use listening and questioning techniques to gain a thorough understanding. • question the customer's implicit assumptions and practices. • communicate complex concepts clearly and simply, verbally and in writing. 			
My competence score for this competency area is:			

Self-Assessment of Competence

Competencies & Indicators	1	2	3
Compliance Checklist Development - Compliance Matrix are lists of bid requirements and customers questions that must be answered. They are used to verify that all requests have been answered.			
My confidence score for this competency area is:			
Extensive understanding (score of 3) means that I am able to: <ul style="list-style-type: none"> • assess the customer evaluation and weighting criteria for the bid. • strip complex requirements and build complex compliance matrices, listing each requirement separately. • define strategies and plan alternative courses of action to accommodate non-compliance. • discuss compliance with the customer and effectively communicate compliance requirements to team. • facilitate regular internal compliance review meetings. • monitor compliance of the bid throughout. • communicate complex concepts clearly and simply, verbally and in writing. 			
My competence score for this competency area is:			
Outline Development - Development of an outline that is customer focused by identifying the detailed structure of the bid/proposal and then allocating appropriate contributors based on that structure. A well designed proposal outline will provide writers with a clear concept of what the bid deliverables are, what they will look like and their size.			
My confidence score for this competency area is:			
Extensive understanding (score of 3) means that I am able to: <ul style="list-style-type: none"> • develop a customer focused proposal outline following RFP guidelines. • recognise scope for and identify boilerplate. • add extra structure to meet the evaluation and weighting criteria. • approve the customer focused proposal outline. • use the proposal outline to manage control of the writing process. 			
My competence score for this competency area is:			

Self-Assessment of Competence

Manage processes

Competencies & Indicators	1	2	3
Process Management - Adaptive management within a defined bid process framework help organisations to improve their win rate through the efficient use of systematic actions to capture new business.			
My confidence score for this competency area is:			
Extensive understanding (score of 3) means that I am able to: <ul style="list-style-type: none"> • recognise best practice process, including roles and reviews. • coach others in all aspects of process best practice. • exploit process adaptively within organisations. • define and champion process improvement. • strive for continuous improvement to achieve long term business objectives. • question implicit process assumptions and practices to shape organisational change. • identify and champion the need for bid process related organisational change. • create a forward thinking culture. • create a culture in which change is embraced for enhanced performance. 			
My competence score for this competency area is:			
Kick Off Meeting Management - Preparing for and running a Kick Off meeting is a critical milestone that requires careful planning followed by professional delivery. It should initiate the proposal effort for all writers, answer questions about the opportunity, allocate writing assignments, co-ordinate up-coming activities and create a cohesive team.			
My confidence score for this competency area is:			
Extensive understanding (score of 3) means that I am able to: <ul style="list-style-type: none"> • require that a Kick-off meeting be held. • direct and chair the kick-off meeting. • review, critique and authorise presentation and documentation (Proposal Management Plan [PMP]). • coach others in the use of kick-off meetings. • actively promote the use of kick-off meetings. • create and sustain inspiration, energy and focus over time, even under adverse conditions. • lead multiple teams balancing conflicts and interests. • initiate wide ranging action to achieve business objectives. • communicate clearly to a wide and diverse audience. 			
My competence score for this competency area is:			

Self-Assessment of Competence

Competencies & Indicators	1	2	3
Content Plan Review Management – Content Plan Reviews allow key stakeholders and senior management to constructively test the proposed win strategy by reviewing wall mounted content plans before the bid team begin to draft the text.			
My confidence score for this competency area is:			
Extensive understanding (score of 3) means that I am able to: <ul style="list-style-type: none"> plan, schedule and manage Content Plan Reviews, their outcomes and the process. provide the Draft Executive Summary for the Content Plan Review. chair the Content Plan Review meeting. coach senior managers on the aims, objectives and purpose of the Content Plan review. promote the active use of Content Planning. use the Content Planning process adaptively. set organisational values when making decisions. lead multiple teams balancing conflicts and interests. initiate wide ranging action to achieve business objectives. communicate clearly to a wide and diverse audience. 			
My competence score for this competency area is:			
Review Management - Managing reviews effectively are the most cost effective way to improve a bid. Reviews that have clearly defined objects will test different aspects of the bid during the development phase.			
My confidence score for this competency area is:			
Extensive understanding (score of 3) means that I am able to: <ul style="list-style-type: none"> ensure all actions from review are closed. promote the active use of defined reviews. Use the review process adaptively. create and sustain inspiration, energy and focus over time, even under adverse conditions. lead multiple teams balancing conflicts and interests. initiate wide ranging action to achieve business objectives. communicate clearly to a wide and diverse audience. 			
My competence score for this competency area is:			

Self-Assessment of Competence

Competencies & Indicators	1	2	3
<p>Document Readiness Review Management - A Document Readiness review with senior managers will test a good final draft of the bid against customer expectations by evaluating the customer focus, completeness and clear communication of the win strategy and solution. Document Readiness Team reviews provide positive, constructive recommendations to improve the bid, improve the win probability and improve the ability of individuals and the team to capture future business.</p>			
My confidence score for this competency area is:			
<p>Extensive understanding (score of 3) means that I am able to:</p> <ul style="list-style-type: none"> • direct and lead the Document Readiness Team Review. • identify, recruit and brief appropriate reviewers. • communicate the Document Readiness Team review comments to the bid team. • coach and advise solutions to open actions from the Document Readiness Team review. • use the Document Readiness team process adaptively. • communicate complex concepts. 			
My competence score for this competency area is:			
<p>Risk Mitigation Management - The development of strategies for containing the risks inherent in a proposed approach or offer. Customers understand that every offer will entail risk; they wish to see, and best practice recommends, discussion of how risk will be managed. Superior value can justify increased risk, therefore it is important to understand the degree of risk that is acceptable to the customer. All major project risks should be identified and quantified.</p>			
My confidence score for this competency area is:			
<p>Extensive understanding (score of 3) means that I am able to:</p> <ul style="list-style-type: none"> • ensure that all aspects of risk are recognised. • develop and own the risk management strategy. • ensure that the bid / proposal risks are documented, articulated, communicated and accepted by senior management as part of the risk strategy. • question implicit assumptions and practices. • think 'out of the box' and advise on the implications of different options available. • take and manage entrepreneurial risks. • set organisational values when making decisions. • initiate and sponsor new approaches. 			
My competence score for this competency area is:			

Self-Assessment of Competence

Competencies & Indicators	1	2	3
<p>Production Management - The infrastructure and resources must be ensured and available to produce a high quality bid for the customer. The quality with which the proposal is presented will influence the customer's perception of the organisation's ability to deliver quality.</p>			
My confidence score for this competency area is:			
<p>Extensive understanding (score of 3) means that I am able to:</p> <ul style="list-style-type: none"> • ensure and facilitate sufficient infrastructure and resource for the size and complexity of the bid. • continuously monitor infrastructure and resource against the schedule and develop contingency plans. • review and revise the final production plans. 			
My competence score for this competency area is:			
<p>Lessons Learnt Analysis and Management - The ability to gather internal and external feedback and apply lessons learnt to the benefit of the organisation. Obtaining both internal and external feedback is vital to apply lessons learnt to the benefit of the organisation. Recognising the need for change ensures continuous improvement. As circumstances change, organisations change and better ways of doing things are learned, changes to process should be suggested. Lessons learned should be captured from the bid team and the customer.</p>			
My confidence score for this competency area is:			
<p>Extensive understanding (score of 3) means that I am able to:</p> <ul style="list-style-type: none"> • drive the Lessons Learnt process both internally and externally. • manage the Lessons Learnt process. • ensure the feedback is captured and documented as Lessons Learnt. • share Lessons-Learnt Report. • recognise systematic process issues and drive their resolution. • strive for continuous improvement to achieve long term business objectives. • question implicit process assumptions and practices to shape organisational change. • identify and champion the need for bid process related organisational change. • create a forward thinking culture. • create a culture in which change is embraced for enhanced performance. 			
My competence score for this competency area is:			

Self-Assessment of Competence

Use tools and systems

Competencies & Indicators	1	2	3
<p>Opportunity Plan Development - Following an effective action-orientated capture plan provides the opportunity to influence the customer and shape the requirement in favour of an organisation prior to proposals being submitted. A capture plan written, action orientated plan that assesses the environment and how to implement a winning strategy orientated toward capturing a specific business opportunity.</p>			
My confidence score for this competency area is:			
<p>Extensive understanding (score of 3) means that I am able to:</p> <ul style="list-style-type: none"> • put together a Business Opportunity Plan. • use the Opportunity Planning process adaptively for all types of customers and opportunities. • use the Opportunity Planning process and information to drive the proposal. • ensure that the Opportunity plan contains actions that will advance the proposal. • ensure that the Opportunity plan is maintained and evolves throughout the proposal timetable. 			
My competence score for this competency area is:			
<p>Content Plan Development - Development of content plans for the bid / proposal that capture and communicate win strategy and win themes. Content plans help ensure consistency across the sections, compliance and responsiveness and assist the bid team to write content that is easy to evaluate, fully compliant and sells the solution offering as the best solution.</p>			
My confidence score for this competency area is:			
<p>Extensive understanding (score of 3) means that I am able to:</p> <ul style="list-style-type: none"> • develop Content plans as a framework for the proposal. • to drive the process to complete the content plans. • communicate to the team the win strategy for the content plans. • review the content of the content plans. • identify supporting information required for the storyboards. 			
My competence score for this competency area is:			
<p>Knowledge Management - The appropriate use of tools, process and culture that reuse and share organisational information and knowledge.</p>			
My confidence score for this competency area is:			
<p>Extensive understanding (score of 3) means that I am able to:</p> <ul style="list-style-type: none"> • define a knowledge management strategy. • use current knowledge management tools. • share knowledge and add to knowledge base. • access all internal sources of information. 			
My competence score for this competency area is:			

Self-Assessment of Competence

Competencies & Indicators	1	2	3
<p>Schedule Development - Preparing a realistic schedule with a time plan of events, a resource plan and an estimate of expenditure requires a clear understanding of each task and the capability of the individuals assigned. The complexity of the schedule will depend on the size of the bid, the number of expertise and the location of all contributors. Scheduling will allow visualisation of the tasks ahead and provides a tool against which progress can be monitored.</p>			
My confidence score for this competency area is:			
<p>Extensive understanding (score of 3) means that I am able to:</p> <ul style="list-style-type: none"> • schedule activities and plan resource for complex bids. • develop budget for complex bids. • construct flowcharts to support the schedule. • schedule adaptively as circumstances change. • prepare my own area of responsibility for the future. • initiate wide ranging action. 			
My competence score for this competency area is:			
<p>Report Management - Internal reports should be kept up to date and regularly provided to senior management and key stakeholders in support of the bid activity. Reporting to Senior Management and key stakeholders on the bid activity and progress ensures their support for resource and that expectations are met in developing the solution.</p>			
My confidence score for this competency area is:			
<p>Extensive understanding (score of 3) means that I am able to:</p> <ul style="list-style-type: none"> • develop the reports / presentations for Senior Management and key stakeholders. • answer questions and negotiate solutions and resolutions. • guide the organisational expectations. • defuse political situations. • communicate complex concepts. • create and sustain political coalitions. 			
My competence score for this competency area is:			

Summary of Scores

Competence Category	Confidence Score	Competence Score	T, M, C or F
Sales Participation			
Executive Summary Development			
Proposal Strategy Development			
Winning Strategy Development			
Winning Price Development			
Teaming Identification			
Requirements Identification			
Compliance Checklist Development			
Outline Development			
Process Management			
Kick Off Meeting Management			
Content Plan Review Management			
Review Management			
Document Readiness Review Management			
Risk Mitigation Management			
Production Management			
Lessons Learnt Analysis and Management			
Opportunity Plan Development			
Content Plan Development			
Knowledge Management			
Schedule Development			
Report Management			
Totals			

Summary of Scores

Look at each of your scores against each competency category. In the final column, use the following table to decide whether you put a T, M, C or F in the final column:

Confidence Score	Competence Score	T, M, C or F
3	3	F
3	2	M
3	1	M
2	3	C
2	2	T
2	1	T
1	3	C
1	2	T
1	1	T

For each competency area, in the categories, where you have put a T, M or C, you have defined a development path that is the most appropriate for you, namely:

T = Trained - where training is identified as the appropriate development approach, the result suggests that you will be open to being trained, either individually or as part of a group.

C = Coached - where coaching is identified as the appropriate development approach. An individual, either external or internal to the organisation, should be appointed to act as a coach for you and you should be encouraged to use your knowledge / skills to exercise that competency area.

M = Mentored - where mentoring is identified as the appropriate development approach, an individual, either external or internal to the organisation, should be appointed to act as a mentor and you should be shown the correct application of that competency area.

Where you have put a T, you have defined yourself as being suitable to being considered for helping with the development of others, namely:

F = Facilitator - where facilitating is identified, you should consider becoming a Mentor or Coach to others.

A mentor is as "A wise and trusted advisor or guide" and mentors "guide, advise and support the development of mentees". A mentor uses their knowledge and expertise of a subject to show the mentee what they can do.

A mentor is likely to share some experience, and this marks a clear departure from coaching as it is usually understood.

A coach is expert in "facilitating another's personal journey". We'll call the person they work with a client, whether they are a colleague or not. A coach will give the client the maximum space to find their own answers, and enable them to explore as deeply as they like.

A mentor uses their knowledge and expertise of a subject to show the mentee what the mentee can do while a coach may not know the particular area at all and simply elicits. Many organisations use mentoring as a way for senior employees to guide junior employees, while coaches are more likely to be external.

Summary of Scores

When formalised, mentoring and coaching have their own methodologies and can be quite distinct, but much coaching and mentoring is informal, and we might slide from one to the other during a single conversation, almost without noticing.

While a coach might not want to be a mentor – they don't want to influence the other's views with their own – a mentor might be a good coach.

Personal Development Plan

Development planning

The Personal Development Plan (PDP) should be prepared collaboratively by you and the person responsible for your development.

You should use a template like this to record your planned approach to your development. Transfer to this PDP your appropriate development paths for each of the competency categories; recording whether the best approach is Training, Mentoring or Coaching.

PDP Framework

A framework for the PDP is included here. The following is a key to terminology used in template.

1. Development Objectives are objectives that have been identified to enable you to meet the learning and development needs
2. Priority identifies whether the development objective is:
 - i. critical to your current role
 - ii. beneficial but non-critical to your current role
 - iii. critical to you progressing into future role
 - iv. beneficial but non-critical to progressing into future role
3. Activities can constitute any learning or development activity that will enable you to achieve the development objectives e.g. formal training, on-the-job training, work-shadowing another colleague etc.
4. Support/Resources describe what you need to help you achieve the development objectives. Typically this would involve support from a manager, department or colleague to enable you to undertake a learning or development activity, such as allowing you time away from your role
5. Target and Actual dates state when you intend to achieve the development objectives; followed by the date you actually achieve them
6. Review date states when progress will be reviewed

Personal Development Plan

What are my development objectives?	Priority	What activities do I need to undertake to achieve my objectives?	What support / resources do I need to achieve my objectives?	Target date for achieving my objectives	Actual date of achieving my objectives
Review Date:					