

# APMP Foundation Level Accreditation – Glossary of Terms



**APMP<sup>®</sup>**

ASSOCIATION OF PROPOSAL MANAGEMENT PROFESSIONALS



## APMP Glossary

### Account Plan

An account plan is a sales plan that is specific to one particular customer and will cover multiple opportunities with that customer. The time span is typically two to five years.

### Action Caption

A short informative statement against a graphic which provides additional information about the content of the graphic that will help the reader draw the right conclusion.

### Advantage

An advantage is in the opinion of the seller, a benefit or possible benefit to the customer. They may arise when the customer's issues are unclear to the seller and the seller makes assumptions about customer issues.

### Benefit

A benefit of an offer will resolve a customer issue. To claim a benefit, there must be a feature of the offer that clearly allows the benefit to be realised.

### Bid Centre

A Bid Centre is a support organisation dedicated to generating proposal and other response documents for customers during the business acquisition cycle. Also called *Proposal Centre*.

### Bidder Comparison Matrix

A tool used to compare a potential offer against possible competitor offers as judged by the customer.

### Best and Final Offer (BAFO)

A customer request for a document that describes your organisations final price. There may be more than one request for a BAFO. The customer will request after the proposal has been submitted and to select the final companies to negotiate with.

### Black Hat Reviews

Review of competitors' likely strategies and solutions by people who are independent of the pursuit team and are experts on the customer and competitors.

### Boilerplate

Boilerplate is text and graphics that is stored so that it is available for repeated use in multiple proposals.

### Business Case

The term business case may be used to describe an internal documented argument for bidding a particular opportunity and will typically focus on the commercial aspects of the bid. The same term may also be applied to a proposal section that is aimed at giving the customer commercial justification for making the purchase.

### Capture Plan

Documented analysis, strategies, and actions initiated following the pursuit decision that details customer issues, considerations relating to competitor and internal positioning, approaches to be implemented, and management tasks to be implemented to guide the capture of a specific opportunity

## **Capture Strategy**

A plan to win a specific defined opportunity. Same as *Sales Strategy* and *Win Strategy*.

## **Compliance Checklist**

A list of specific customer requirements. The list is often generated by splitting complex questions into separate requirements.

## **Compliance Matrix**

Also called a response matrix. The matrix is a road map that enables the evaluator to use a reference that points to specific proposal responses for each compliance item. The matrix may also contain a summary response.

## **Customer Profile**

A maintained record of the characteristics of a customer. The profile will be used from bid to bid and will provide useful background information.

## **Discriminator**

A unique feature of an offer that supports a benefit. Commonly, a weak discriminator is where the feature is only different to one other competitor rather than all competitors.

## **Elevator Speech**

A concise written set of reasons why the customer should choose your organisation

## **Executive Summary**

A short summary of the main points of the offer aimed at the senior level decision makers in the customer's organisation.

## **Feature**

Features are tangible aspects of the offer. They are normally measurable and demonstrable.

## **Hot Buttons**

Singularly important issue or set of issues that are likely to drive decisions, usually associated with customer buying decisions.

## **Invitation to Tender (ITT)**

A customer document that invites a bid. In many industries, these are complex requirement documents that cover all technical and commercial aspects of the bid. Also known as RFP

## **Issues**

Issues are the concerns of the customer that require resolution by the bidder. Issues may be emotional and not articulated in the customers requirement documents.

## **Kick-off Meeting**

Meeting that serves to initiate the proposal effort for all contributors, answer questions about the opportunity, make writing assignments, coordinate upcoming activities, and create a cohesive team

## **Management Summary**

Alternative name to *Executive Summary*.

## **Market Strategy**

A plan to achieve specific market objectives.

## **Motivators**

A subset of issues that relate to the fundamental reasons behind the customer's need to make a purchase. Sometimes called *motivators to buy*.

## **Pro-active Proposal**

A proposal that is generated following an informal discussion with the customer – generally following a sales visit or telephone call where a customer requirement is discovered. Same as *Unsolicited Proposal*

## **Proposal Centre**

In the UK, same as Bid Centre.

## **Proposal Manager**

Person responsible for proposal development, including maintaining schedules; coordinating inputs, reviews, strategy implementation; resolving internal problems; and providing process leadership.

## **Proposal Outline Plan**

A structure for the proposal that is usually derived from the customer's requirements documentation. The outline may be annotated to show writing responsibilities, page count estimates and so on.

## **Proposal Process**

A systematic series of scaleable actions or steps directed to winning bids.

## **Proposal Resource Schedule**

A task based plan that identifies the period of time that effort is required against each task.

## **Proposal Responsibility Matrix**

A matrix that identifies proposal team members with specific proposal sections responsibility.

## **Proposal Strategy**

A plan to write a persuasive, winning proposal. A proposal strategy is derived from the *Capture Strategy*.

## **Re-active Proposal**

A Proposal that is generated following a formal request from a customer. Same as *Solicited Proposal*

## **Red Team Review**

Review to evaluate the proposal for customer focus, completeness and clear communication of the win strategy and solution by people who are independent of the proposal team and offer different perspectives, typically by experts on the prospect, the prospect's industry, competitors, the organisation, technology, approach, and on preparing and presenting winning proposals

**Request for Information (RFI) or PQQ**

A customer document often used at an early stage in procurement in order to create a list of bidders who will later be invited to tender.

**Requirements Checklist**

Similar to a compliance checklist, but can be self-generated when there is no written customer requirement. Is often used as a tool to monitor progress.

**Response Matrix**

Alternative term for *compliance matrix*.

**Sales Strategy**

Same as *Capture Strategy* and *Win Strategy*.

**Solicited Proposal**

A proposal that is compiled following a formal request by the customer, whether or not there has been active contact previously with the customer. Same as *Reactive Proposal*

**Storyboard**

Conceptual planning tool used to help writers plan each section before drafting text; contains assignments, bid request requirements, strategies, preliminary visuals, and contents

**Theme Statement**

A short articulation to the customer of the main point in a proposal section. Typically, the theme statement would link a discriminating feature to a benefit.

**Unsolicited Proposal**

A proposal that is generated following an informal discussion with the customer – generally following a sales visit or telephone call where a customer requirement is discovered. Same as *Pro-active Proposal*

**Value**

Essentially, what the offer is worth to the purchaser. It is rarely fully quantifiable by purchasers.

**Value Proposition**

An attempt to specifically address how aspects of the offer impact on the customer's business.

**Win Strategy**

Same as *Capture Strategy* and *Win strategy*.

**Work Breakdown Structure**

Deliverable-oriented grouping of project elements that organizes and defines the total work scope of the project; each descending level represents an increasingly detailed definition of the project work