APMP
Accreditation Program
Syllabus

APMP®

ASSOCIATION OF PROPOSAL MANAGEMENT PROFESSIONALS

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Introduction

The APMP has defined the "competencies" that are required of Proposal Management Professionals. This activity is now complete. As a result, APMP is able to launch the world's first Professional Accreditation Program for Proposal Management Professionals.

The Professional Accreditation Program uses a process of competency assessment that is consistent and fair as well as measured against world best practice standards. There are three levels of professional accreditation:

- APMP-Foundation Level
- APMP-Practitioner Level
- APMP-Professional Level

The diagram below is a graphic depiction of the steps to becoming accredited as an APMP-Professional.
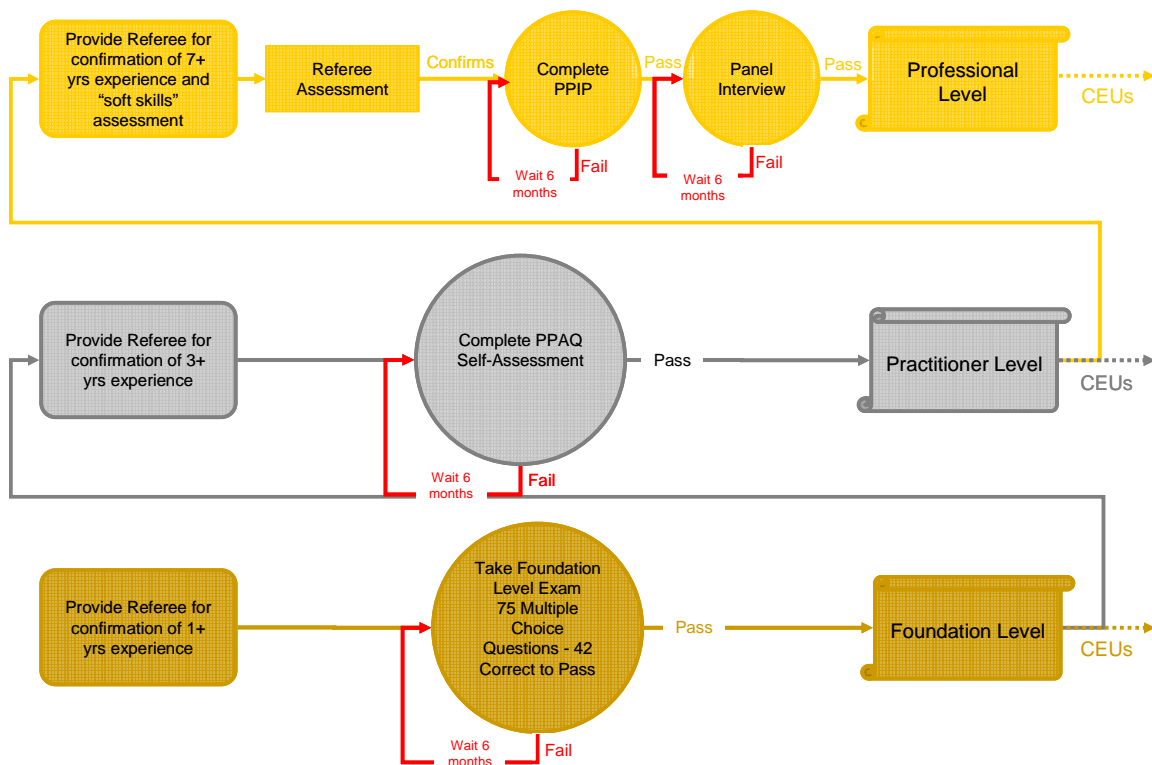
Figure 1: The Professional Accreditation Process: *Through a formal process of examination, self-assessment, and interview, APMP members can demonstrate their mastery of the knowledge, skills, and attitudes required of the Proposal Management Professional.*

Purpose

This syllabus is designed to provide a basis for accreditation of Proposal / Bid Management professionals. The syllabus is orientated around best practices which can be found in the public domain, including such documents as:

- The APMP Glossary of Terms – This document can be viewed on line and can be downloaded by following the link at the end of the Glossary. It should be studied by all Foundation level examination candidates, to ensure that no confusion arises over the use of terminology

- Microsoft Word Training – These on-line workshops provide an overview of best practices in writing any documents.

- The Shipley Proposal Guide - Author Larry Newman, Shipley Associates, available from the Shipley website.

- Merriam-Webster's Manual for Writers and Editors

- The Chicago Manual of Style: For Authors, Editors and Copywriters

Description of Accreditation Levels

The following section describes the competencies required at each level:

Foundation level

This level is aiming to measure whether a candidate would be able to act as an informed member of a proposal / bid team within a proposal environment using appropriate methods to support process.   To this end they need to show they understand the principles and procedures and terminology of accepted methods of work. Specifically candidates should:

- be a member of the Association of Proposal Management Professionals (APMP) - Candidates must provide the Association with a Certificate of Experience (CoE), signed by the candidate's line manager (or a peer) confirming that the candidate has at least one year's experience working in a proposal environment.

- have a minimum of one year's experience working in a proposal / bid environment.

- The candidate must answer correctly 42 or more questions in the independent, multiple-choice, examination designed to test the candidate's learning and development within a bid / proposal environment.

Candidates should be able to demonstrate knowledge of:

- the relationships between processes, deliverables, roles and the management dimensions of a proposal / bid lifecycle as described in published best practice reference works

- the tools available to assist with process management, planning and production

- industry terminology within the proposal / bid environment as described in 'the APMP Glossary of Terms'

- specific process stages as described in the published best practice reference works

- proposal / bid document reviews and techniques

- internal organization assessment / analysis processes and procedures and external customer assessment / analysis processes and procedures

NB: For SME owners and sole practitioners, 'line manager' could be interpreted as 'commissioning customer', and 'peer' as 'those working with the candidate on significant proposals'.

Practitioner level

This level is aiming to measure whether a candidate would be able to apply Process and Procedures to running and managing a Proposal / Bid within a proposal / bid environment that supports process and procedures. To this end they need to exhibit the competencies required

for the Proposal Practitioner qualification, and show that they can apply and tune Principles, Process and Procedures to address the needs and problems of a customer response. Specifically, candidates must:

- Be a member of the Association of Proposal Management Professionals (APMP).

- Have achieved Foundation Level status.

- Have a minimum of three years experience working in a proposal environment.

Candidates must be able to:

- apply the process and procedures and tools and techniques, in a variety of circumstances.

- Demonstrate that they understand the relationships between processes, components, techniques and can apply this understanding.

- Demonstrate that they understand the reasons behind the processes, components and techniques and that they understand the principles underpinning these elements.

- Demonstrate their ability to relate process and procedures to different proposal / bid response circumstances.

- Demonstrate an understanding of what it takes to win business with proposals.

- Demonstrate a willingness to seek Continuing Professional Development (CPD).

Proposal Professional

This level measures whether a candidate would be able to require the use of, and drive the application and continuous improvement of organizational Best Practice Process and Procedures within the proposal / bid environment.

Specifically, candidates must:

- Be a member of the Association of Proposal Management Professionals (UK APMP).

- Have achieved Proposal Foundation level

- Have achieved Proposal Practitioner level.

- Have a minimum of seven years' experience working in a proposal environment.

- Provide details of a referee that is prepared to complete an on-line assessment in the area of Behaviour and Attitude.

- Have made a contribution towards furthering the profession.

- Have helped develop others within the profession.

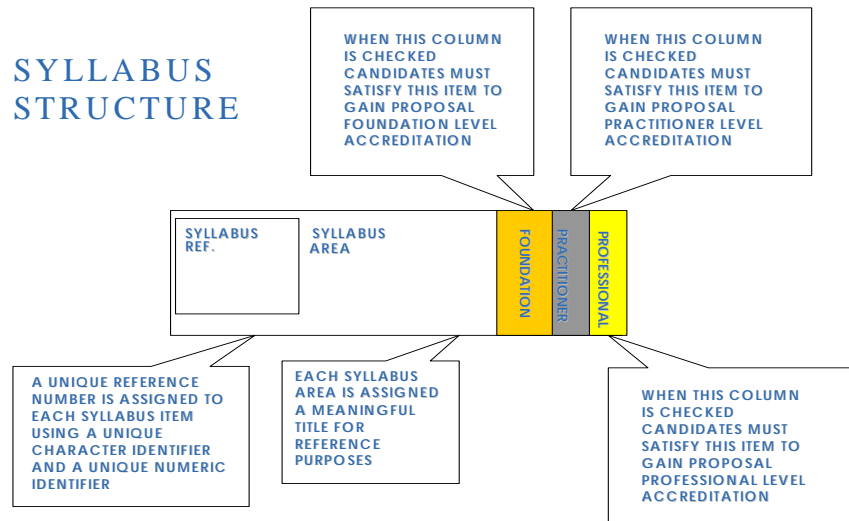- Have a track record of Continuing Professional Development (CPD).

The Candidate must be able to

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- Demonstrate that they can drive a team to recognize intelligence gaps and to use existing internal and external data sources in bids.

- Demonstrate that they understand how to make or endorse compliance decisions and approve the proposal structure.

- Demonstrate that they understand and are able to ensure that the proposal team are right for the task.

- Demonstrate that they are proficient in the use of and require storyboarding to take place.

- Demonstrate that they are proficient in the use of and take part in reviews.

- Demonstrate that they are proficient in the complete proposal / bid process.

- Demonstrate that they are proficient at driving process improvement and exploiting process adaptively

- Demonstrate that they are proficient at identifying and developing requirements collaboratively with customers

- Demonstrate that they are expert at assessing complex strategic opportunities.

- Demonstrate that they are proficient in maintaining the Capture Plan with significant innovation

- Demonstrate they are proficient in recognising the need for, and identifying suitable partners, recruiting and negotiating teaming agreements

- Demonstrate that they are proficient in defining contingency plans

- Demonstrate they are proficient at owning the proposal risks

- Demonstrate they are proficient at implementing policy.

- Demonstrate they are proficient at briefing team members on wider aspects of the proposal; customer, strategy, outline solution.

- Demonstrate they are proficient at owning the win strategy and the business case.

- Demonstrate they are proficient at operating to broad guidelines from senior managers.

Structure of the Syllabus

The syllabus will also inform the design, development and use of training materials and courses aimed at raising individual's understanding of and competence in the proposal management approach.

The syllabus has been designed with ease of reference, extensibility and ease of maintenance in mind. The structure of the syllabus is depicted in the following diagram.

SYLLABUS STRUCTURE

WHEN THIS COLUMN IS CHECKED CANDIDATES MUST SATISFY THIS ITEM TO GAIN PROPOSAL FOUNDATION LEVEL ACCREDITATION

WHEN THIS COLUMN IS CHECKED CANDIDATES MUST SATISFY THIS ITEM TO GAIN PROPOSAL PRACTITIONER LEVEL ACCREDITATION

SYLLABUS REF.

SYLLABUS AREA

FOUNDATION | PRACTITIONER | PROFESSIONAL

A UNIQUE REFERENCE NUMBER IS ASSIGNED TO EACH SYLLABUS ITEM USING A UNIQUE CHARACTER IDENTIFIER AND A UNIQUE NUMERIC IDENTIFIER

EACH SYLLABUS AREA IS ASSIGNED A MEANINGFUL TITLE FOR REFERENCE PURPOSES

WHEN THIS COLUMN IS CHECKED CANDIDATES MUST SATISFY THIS ITEM TO GAIN PROPOSAL PROFESSIONAL LEVEL ACCREDITATION

Figure 2: The Accreditation Syllabus Structure: *The syllabus structure depicts the levels of competency the candidates must satisfy to achieve the different accreditation levels.*

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APMP Accreditation Joint Syllabus

Syllabus Ref.		Syllabus Area	Foundation	Practitioner	Professional
Information Research and Management					
Information Gathering					
IRIG	01	Candidates should be able to look for gaps in intelligence.	√	√	√
IRIG	02	Candidates should be able to help define a plan for intelligence gathering		√	
IRIG	03	Candidates should be able to lead a team to identify knowledge gaps.		√	
IRIG	04	Candidates should be able to own and operate an intelligence gathering plan.		√	√
IRIG	05	Candidates should be able to be active in intelligence analysis	√	√	
IRIG	06	Candidates should be able to drive a team to recognise intelligence gaps.			√
IRIG	07	Candidates should be able to monitor and assist in the collection and analysis of intelligence.			√
IRIG	08	Candidates should be able to use senior level connections / networks.			√
Knowledge Management					
IRKM	01	Candidates should be aware of existing internal and external data sources in bids.	√		
IRKM	02	Candidates should be able to add to the knowledge base.	√	√	√
IRKM	03	Candidates should be expert in using existing internal and external data sources in bids.		√	√
IRKM	04	Candidates should drive and guide others to use existing internal and external data sources in bids.			√
Planning					
Schedule Development					
PSD	01	Candidates should understand and tailor proposal tasks to suit the proposal.	√		
PSD	02	Candidates should fully understand internal processes.	√		
PSD	03	Candidates should be able to assess customer timescales and estimate the resources required to execute the proposal.	√		
PSD	04	Candidates should be able to produce a cost budget for a routine proposal.	√		
PSD	05	Candidates should be expert in matching internal proposal tasks to specific bids.		√	√

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Syllabus Ref.		Syllabus Area	Foundation	Practitioner	Professional
PSD	06	Candidates should be able to accurately assess timescale and resource implications of the customer's procurement process.		√	√
PSD	07	Candidates should focus on the efficient use of internal resources.		√	
PSD	08	Candidates should be able to produce cost estimates for complex proposal situations.		√	√
PSD	09	Candidates should be able to define a contingency plan.		√	√
PSD	10	Candidates should be able to approve a proposal schedule.		√	√
PSD	11	Candidates should be able to sell a proposal schedule and resourcing requirements internally.		√	√
PSD	12	Candidates should be alert to the need for changes in the proposal schedule.		√	√

Development

Opportunity Qualification

			Foundation	Practitioner	Professional
DOQ	01	Candidates should be able to qualify routine opportunities.		√	
DOQ	02	Candidates should be able to qualify strategic opportunities.		√	
DOA	03	Candidates should be expert at assessing complex strategic opportunities.			√
DOQ	04	Candidates should be able to present data for a qualification meeting.	√		
DOQ	05	Candidates should be able to use qualification tools.	√	√	√
DOQ	06	Candidates should be a leading contributor to qualification decision.		√	√

Winning Price Development

			Foundation	Practitioner	Professional
DWPW	01	Candidates should be able to analyse competitors and customer to establish a winning price target.	√	√	√
DWPW	02	Candidates should be able to work with others to set cost targets.	√		
DWPW	03	Candidates should be able to ensure the development of sound business case.	√	√	√
DWPW	04	Candidates should be able to understand the difference between value and price.	√	√	√
DWPW	05	Candidates should be able to balance value and price to drive the scope of offer.		√	
DWPW	06	Candidates should be able to plan ahead to negotiating stage.		√	
DWPW	07	Candidates should be able to drive the business case.		√	
DWPW	08	Candidates should be able to take ownership of the pricing strategy.			√

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Syllabus Ref.		Syllabus Area	Foundation	Practitioner	Professional
DWPW	09	Candidates should be able to thinks in terms of deal to win not price to win.			√
DWPW	10	Candidates should be able to own the business case.			√

Teaming Identification

DTI	01	Candidates should be able to recognize the need for teaming partners.	√	√	
DTI	02	Candidates should be able to help identify suitable partners.	√	√	
DTI	03	Candidates should be able to help recruit partners.	√	√	
DTI	04	Candidates should be able to facilitate the negotiation of teaming agreements.		√	
DTI	05	Candidates should be active in negotiating the teaming agreements.		√	
DTI	06	Candidates should be able to drive the core team to recognize need for teaming partners.			√
DTI	07	Candidates should be active in identifying suitable partners.			√
DTI	08	Candidates should be able to lead the recruitment of partners.			√
DTI	09	Candidates should be able to negotiate and own the teaming agreements.			√

Proposal Strategy Development

DPSD	01	Candidates should be able to identify how the customer perceives the organization	√	√	√
DPSD	02	Candidates should be able to identify the customer's perceptions of the competitors	√	√	√
DPSD	03	Candidates should be able to identify the +ve and –ve discriminators for the opportunity	√	√	√
DPSD	04	Candidates should be able to develop proposal strategy statements in a 'what' / ' how' format	√	√	√
DPSD	05	Candidates should be able to assign proposal strategies to individual proposal sections		√	√
DPSD	06	Candidates should be able to coach others to define and use proposal strategy statements effectively		√	√

Executive Summary Development

DESD	01	Candidates should understand the key elements of Executive Summary development.	√		
DESD	02	Candidates should use the Executive Summary as a proposal briefing tool.	√	√	√
DESD	03	Candidates should be able to drive writing of early Executive Summary.		√	√
DESD	04	Candidates should be able to collaborate in writing of early Executive Summary.			√

Syllabus Ref.		Syllabus Area	Foundation	Practitioner	Professional
Storyboard Development					
DSD	01	Candidates should be able to understand the benefits and appropriate use of storyboarding proposals.	√	√	√
DSD	02	Candidates should be able to design and complete simple storyboards.	√		
DSD	03	Candidates should be able to brief contributors in the use of storyboards.	√	√	√
DSD	04	Candidates should coach contributors in completing storyboards.		√	√
DSD	05	Candidates should approve the choice of sections to be storyboarded.		√	√
DSD	06	Candidates should drive completion of storyboards.		√	√
DSD	07	Candidates should require storyboarding to be carried out.			√
Requirements Identification					
DRI	01	Candidates should be able to identify documented customer requirements.	√	√	√
DRI	02	Candidates should be active in identifying requirements from documents and in customer meetings.		√	√
DRI	03	Candidates should be able to identify and develop requirements collaboratively with customer.			√
Compliance Checklist Development					
DCCD	01	Candidates should be capable of stripping complex requirements.		√	√
DCCD	02	Candidates should be capable of building a compliance matrix.	√	√	√
DCCD	03	Candidates should be able to make decisions about meeting requirements or being non-compliant.		√	√
Outline Development					
DOD	01	Candidates should be capable of structuring a proposal to meet the requirements of the customer's evaluation team	√	√	√
DOD	02	Candidates should be able to add extra document structure if required.	√	√	√
DOD	03	Candidates should recognize scope for re-using material from previous proposals.	√	√	
DOD	04	Candidates should be able to contribute to and approve a customer focused proposal structure.		√	√
DOD	05	Candidates should be able to recruit the right team of contributors.		√	√
DOD	06	Candidates should understand and be able to encourage appropriate use of re-usable material.		√	√
DOD	07	Candidates should be able to approve a customer focused proposal structure.			√

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Syllabus Ref.		Syllabus Area	Foundation	Practitioner	Professional
Management					
Storyboard Review Management					
MSRM	01	Candidates should understand the benefits of storyboard reviews	√		
MSRM	02	Candidates should understand how to manage storyboard reviews.	√	√	
MSRM	03	Candidates should be able to ensure that storyboards are amended.	√	√	
MSRM	04	Candidates should be able to identify and recruit appropriate reviewers.		√	√
MSRM	05	Candidates should be able to take part in review.	√	√	√
MSRM	06	Candidates should understand how to organise storyboard reviews.	√	√	√
MSRM	07	Candidates should be able to promote the active use of storyboarding.			√
Kick-off Meeting Management					
MKO MM	01	Candidates should be able to prepare for kick-off meetings.	√		
MKO MM	02	Candidates should be able to brief kick-off meeting attendees	√	√	√
MKO MM	03	Candidates should be able to task kick-off meeting attendees.		√	√
MKO MM	05	Candidates should be able to use kick-off meeting to motivate the proposal team.		√	√
MKO MM	06	Candidates should ensure that the proposal team have complete task descriptions.		√	√
MKO MM	07	Candidates should enlist the help of appropriate senior managers to emphasize importance of proposal.			√
Review Management					
MRM	01	Candidates should understand common proposal reviews.	√		
MRM	02	Candidates should be able to assemble appropriate information for reviews.	√		
MRM	03	Candidates should be able to present information at reviews.		√	√
MRM	04	Candidates should be able to manage reviews.		√	√
MRM	05	Candidates should be able to manage time to allow reviews and proposal amendment	√	√	√

Syllabus Ref.		Syllabus Area	Foundation	Practitioner	Professional
MRM	06	Candidates should be able to take an active role in proposal reviewing.		√	√
MRM	07	Candidates should understand when to require appropriate proposal reviews.		√	√

Proposal Risk Management

PMRM	01	Candidates should be able to recognize proposal risks.	√		
PMRM	02	Candidates should be able to help establish a proposal risk management policy.	√		
PMRM	04	Candidates should be able to drive the definition of proposal risks.		√	
PMRM	05	Candidates should be able to drive the risk management policy.		√	
PMRM	06	Candidates should be able to obtain management approval of and implement the risk policy.		√	
PMRM	07	Candidates should own the proposal risks.			√
PMRM	08	Candidates should ensure that senior management understand and accept risk management policy.			√
PMRM	09	Candidates should implement policy.			√

Proposal Progress Reporting

PPR	01	Candidates should be able to develop reports / presentations for senior management and key stakeholders.		√	√
PPR	02	Candidates should be able to negotiate solutions to progress issues.		√	√

Final Document Review Management

MRRM	01	Candidates should be able to organize a Final Document review.	√		
MRRM	02	Candidates should be able to identify and recruit appropriate reviewers.	√	√	
MRRM	03	Candidates should be able to lead the review process.		√	
MRRM	04	Candidates should be able to monitor incorporation of review actions.		√	
MRRM	05	Candidates should be able to contribute to the selection of the reviewers.		√	√
MRRM	06	Candidates should be able to take part in the Final Document review.		√	√
MRRM	07	Candidates should be able to promote the active use of Final Document Reviews.			√

Production Management

MPM	01	Candidates should be able to manage proposal production.	√	√	√

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Syllabus Ref.		Syllabus Area	Foundation	Practitioner	Professional
MPM	02	Candidates should be able to understand best practice when creating document styles, format and visuals	√	√	√

Lessons Learnt Analysis and Management

Syllabus Ref.		Syllabus Area	Foundation	Practitioner	Professional
MLL AM	01	Candidates should ensure that internal and external feedback on the proposal is obtained.	√	√	√
MLL AM	02	Candidates should be able to recognize systematic proposal process problems and suggest changes.	√	√	√
MLL AM	03	Candidates should be able to recognize systemic proposal process problems and drive their resolution.		√	√

Proposal Process Management

Syllabus Ref.		Syllabus Area	Foundation	Practitioner	Professional
MPM	01	Candidates should understand the key elements of a good proposal development process.	√		
MPM	02	Candidates should understand the activities required to support the key elements of the proposal development process.		√	
MPM	03	Candidates should be able to contribute to proposal development process adaptation and improvement.		√	
MPM	04	Candidates should be proficient in the complete process.		√	√
MPM	05	Candidates should be able to exploit the process adaptively.		√	√
MPM	06	Candidates should be able to lead process improvement.		√	√
MPM	07	Candidates should be expert in job related aspects.			√
MPM	08	Candidates should be able to drive process improvement.			√

Sales Orientation

Customer Interface Management

Syllabus Ref.		Syllabus Area	Foundation	Practitioner	Professional
SOC IM	01	Candidates should be capable of interfacing with the customer directly, if in a sales role or requested by sales.		√	√
SOC IM	02	Candidates should be able to strategically manage all communications with the customer.		√	√
SOC IM	03	Candidates should be able to discuss all aspects of the proposal with knowledge and authority.			√

Capture Plan Development

Syllabus Ref.		Syllabus Area	Foundation	Practitioner	Professional
SOC PD	01	Candidates should be able to take ownership of the Capture Plan.		√	√
SOC PD	02	Candidates should be able to ensure that the Capture Plan has areas of original thought.		√	√

Syllabus Ref.		Syllabus Area	Foundation	Practitioner	Professional
SOC PD	03	Candidates should be able to ensure that the Capture Plan is maintained.		√	√
SOC PD	04	Candidates should be able to ensure that the Capture Plan has significant innovation.			√
Winning Strategy Development					
SOW SD	01	Candidates should be able to drive the definition of a win strategy.		√	√
SOW SD	02	Candidates should be expert in using all analysis tools.		√	√
SOW SD	03	Candidates should be able to keeps strategies under continuous review to meet changing circumstances.		√	√
SOW SD	04	Candidates should be able to sell the strategy internally and to teaming partners.		√	√
SOW SD	05	Candidates should own the win strategy.			√
Negotiation Planning					
SONP	01	Candidates should be able to be active in negotiation.		√	
SONP	02	Candidates should be able to plan negotiating strategy early.		√	√
SONP	03	Candidates should be able to obtain and operate to defined parameters set by senior management.		√	
SONP	04	Candidates should be able to drive negotiation.			√
SONP	05	Candidates should be able to obtain and operate to broad guidelines from senior managers.			√
Sales Participation					
SOSP	01	Candidates should be familiar with sales methodologies.	√	√	√
SOSP	02	Candidates should be able to take an active part in customer meetings.		√	√
SOSP	03	Candidates should be able to drive customer meetings.			√
Behavior and Attitude					
Communication and Persuasiveness					
BACP	01	Candidates should be able to use appropriate interpersonal styles and communication methods to clearly convey messages		√	√
BACP	02	Candidates should be able to use a variety of media to individuals or groups to engage the audience			√

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Syllabus Ref.		Syllabus Area	Foundation	Practitioner	Professional
BACP	03	Candidates should be able to correctly interpret messages and give an appropriate response		√	√
BACP	04	Candidates should be able to understand a variety of situations needs, and desired benefits and develop positioning approaches that leverage supportive factors and overcome/minimise barriers		√	√
BACP	05	Candidates should be able to address the needs of key decision makers			√
BACP	06	Candidates should be able to interact with prospective customers in a manner that builds effective relationships		√	√

Quality Orientation

Syllabus Ref.		Syllabus Area	Foundation	Practitioner	Professional
BA QO	01	Candidates should be able to accurately check processes and tasks		√	√
BA QO	02	Candidates should be able to identify and take corrective action where necessary		√	√

Building Strategic Relationships and a Successful Team

Syllabus Ref.		Syllabus Area	Foundation	Practitioner	Professional
BA SRST	01	Candidates should be able to develop and use strategic relationships			√
BA SRST	02	Candidates should be able to develop direction and involve others through collaborative working		√	√

Decision Making and Delegating Responsibility

Syllabus Ref.		Syllabus Area	Foundation	Practitioner	Professional
BAD MDR	01	Candidates should be able to identify and understand issues and opportunities and the resulting decisions and have the ability to effectively delegate the implementation of the required activities and responsibilities		√	√
BAD MDR	02	Candidates should be able to implement decisions/initiate action within a reasonable time		√	√
BAD MDR	03	Candidates should be able to include others in the decision making process, make the most appropriate decisions, and ensure buy in and understanding of those decisions.		√	√
BAD MDR	04	Candidates should be able to allocate decision making authority and/or task responsibility appropriately to maximise organisation and individual effectiveness.		√	√