CONCEPT

Proposal and Bid Management: Capture Planning, Win Strategy and Proposal Writing

5 – 9 September 2027
Jeddah - Corniche four-star



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Introduction:

Weak proposal and bid management drains margin in B2B and project businesses: teams chase requests for proposal they cannot win, start writing before a win strategy exists, and submit responses that describe the seller rather than the buyer's outcome. Scattered storyboards, late reviews and unpriced value leave evaluators without a reason to choose. This Core Concept course takes business development and proposal staff through a disciplined pursuit cycle, from qualification and capture to compliant, persuasive writing and debriefs. Participants produce a Case RFP Bid Decision, Win Strategy and Executive Summary Pack.

Course Objectives:

- Qualify commercial opportunities with a weighted bid/no-bid gate that records fit, access to the buyer, competitive position and delivery capacity
- Build a capture plan with customer hot buttons, competitor assessment, discriminators and a ghosting approach before the request for proposal is released
- Convert an RFP into a compliance matrix, annotated outline, storyboards and a kick-off package that assigns every requirement to an author
- Write customer-focused proposal sections, graphics and an executive summary that carry win themes backed by proof points
- Frame a price-to-win position and a cost-benefit case that shows the buyer the return on the proposed solution
- Run colour team reviews, orals rehearsals and post-decision debriefs that feed a lessons-learned log

Target Audience:

- Business development managers who qualify pipeline opportunities and decide which pursuits receive bid resources
- Bid and proposal managers who plan responses, run kick-offs and coordinate contributors to submission
- Capture leads who shape customer relationships and solution positioning before a formal solicitation
- Sales engineers and solution architects who write technical approaches, designs and delivery methodologies
- Technical and proposal writers who edit contributions into a consistent, evaluator-friendly document
- Commercial and pricing analysts who assemble cost volumes and value justifications for proposals

Course Outline:

Day 1: Pursuit Lifecycle, Opportunity Qualification and Bid/No-Bid Gates

- Business Development, Capture and Proposal Phases in the Shipley Lifecycle
- Solicitation Types Compared: RFI, RFQ, RFP and Best and Final Offer
- Pipeline Qualification Criteria: Budget, Authority, Need and Timing
- Weighted Bid/No-Bid Scorecard and Pursuit Gate Decision Record
- Win-Loss Ratio Baseline and Proposal Cost Benchmarking

Day 2: Capture Planning, Customer Insight and Win Strategy

- Capture Plan Template: Opportunity Profile, Stakeholder Map and Action Register
- Customer Hot Buttons and Evaluator Concerns Analysis
- Competitor Assessment Matrix and Ghosting Techniques
- Win Theme Statements: Feature, Benefit, Proof and Discriminator
- Value Proposition Canvas Applied to Buyer Outcomes

Day 3: RFP Analysis, Proposal Planning and Persuasive Writing

- RFP Shredding and Compliance Matrix Construction
- Annotated Outline and Section Storyboards with Theme Placement
- Proposal Kick-Off Meeting Agenda and Author Assignment Plan
- Customer-Focused Writing Using Benefit-First Paragraph Structure
- Action Captions and Proposal Graphics That Summarise Evidence

Day 4: Executive Summaries, Pricing Position, Reviews and Orals

- Executive Summary Structure: Buyer Need, Solution, Proof and Value
- Price-to-Win Estimation and Pricing Strategy Options at Overview
- Cost-Benefit and Return on Investment Justification for the Buyer
- Colour Team Reviews: Blue, Pink, Red and Gold Team Roles
- Oral Presentation Planning, Rehearsal and Question Handling

Day 5: Case RFP Workshop: Bid Decision, Win Strategy and Executive Summary

- Case RFP Reading and Bid/No-Bid Scorecard Completion
- Win Strategy and Discriminator Table for the Case Pursuit
- Compliance Matrix and Storyboard Draft for Two Case Sections
- Executive Summary Drafting and Red Team Critique
- Post-Bid Debrief Questions and Lessons-Learned Log Presentation

Skills You Will Gain:

- Opportunity Qualification
- Capture Planning
- Competitive Discriminator Analysis
- RFP Compliance Mapping
- Proposal Storyboarding
- Persuasive Proposal Writing
- Value Justification
- Proposal Review Management

Why Attend This Course:

- Leave with a Case RFP Bid Decision, Win Strategy and Executive Summary Pack that can serve as a template for live pursuits
- Stop committing proposal effort to requests that fail a documented bid/no-bid gate
- Give evaluators a clear reason to choose your response through themes tied to their stated concerns
- Compare pursuit practice with peers from engineering, IT, consulting and service businesses

Conclusion:

Proposals are won or lost long before the submission deadline, in the qualification, capture and planning work that shapes what the team writes. The course follows the pursuit from bid/no-bid gates and capture plans through RFP analysis, storyboards and customer-focused writing to executive summaries, pricing position, colour team reviews and orals. Debriefs close the cycle so lessons reach the next pursuit. The final day brings these methods together in a case RFP, producing a Case RFP Bid Decision, Win Strategy and Executive Summary Pack ready for use at work.