



# CERTIFICATION PROGRAM SYLLABUS



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# TABLE OF CONTENTS

<b>Introduction</b> .....	3
<b>Certification Levels</b> .....	4
FOUNDATION.....	4
PRACTITIONER.....	4
PROFESSIONAL.....	5
CONTINUING PROFESSIONAL DEVELOPMENT....	5
PROFESSIONAL ACCREDITATION PROCESS.....	6
<b>List of Syllabus Competencies</b> .....	7
INFORMATION RESEARCH AND MANAGEMENT..	7
PLANNING.....	7
DEVELOPMENT.....	8
MANAGEMENT.....	12
SALES ORIENTATION.....	15
BEHAVIOR AND ATTITUDE.....	16



## APMP CERTIFICATION PROGRAM INTRODUCTION

APMP is the association of record for bid, proposal, business development, capture, and graphics professionals. We offer the world's first, best, and only industry-recognized certification program for professionals working in a bid and proposal environment. APMP certification is the global standard for developing and demonstrating proposal management competency.

This certification syllabus is a list of competencies, each corresponding to skills or scenarios that professionals commonly encounter in the bid and proposal environment. These competencies are organized into categories and rooted in industry best practice, including documents such as the *APMP Body of Knowledge* and *APMP Glossary of Terms*.

There are three levels of APMP certification: Foundation, Practitioner, and Professional. This syllabus is designed to provide a basis for certification at each of these levels. It can also be used to inform the design, development, and use of certification training materials.



# CERTIFICATION LEVELS

## FOUNDATION

Foundation Certification is designed for professionals who are relatively new to the bid and proposal environment. To achieve Foundation Certification, you must:

- Be an APMP member
- Have at least 1 year of experience in a bid/proposal environment
- Pass the Foundation Certification exam

The exam is a 1-hour, open-book, multiple-choice, 75-question, pass/fail exam. Exam preparation is determined by level of experience, knowledge of best practices, and participation in training opportunities. APMP offers in-person training courses, printed study guides, and online resources as aids to help prepare for the APMP Foundation Certification exam.

Foundation Certification is designed to assess understanding of relevant business development concepts. As you read through this syllabus, keep in mind that you need not have personally performed all of required competencies to achieve Foundation Certification. You should, however, be able to demonstrate your understanding of the competency by giving an explanation, listing supporting tools, or providing examples, as appropriate.

## PRACTITIONER

Practitioner Certification is for experienced proposal professionals. It validates real-world mastery of industry best practices and the ability to lead others in their use. To achieve Practitioner Certification, you must:

- Be an APMP member
- Have achieved Foundation Certification
- Have at least 3 years of experience in a bid/proposal environment
- Provide a reference who can verify the experience you describe
- Submit the Proposal Practitioner Assessment Questionnaire (PPAQ)

The PPAQ is a 35-question written assessment in which candidates give examples from their professional experience to demonstrate their qualifications. A certified assessor evaluates the PPAQ and then performs a check of the candidate's evidence and references.

Practitioner Certification is designed to assess application of business development best practices. For competencies required for Practitioner Certification, ensure that you not only understand but also have on-the-job experience with these activities.

# CERTIFICATION LEVELS

## **PROFESSIONAL**

Professional Certification is for professionals with extensive experience and superior leadership and communication skills. Individuals with Professional Certification are recognized for developing others and for improving process and infrastructure to the benefit of their organizations. To achieve Professional Certification, you must:

- Be an APMP member
- Have achieved both Foundation and Practitioner Certification
- Have at least 7 years of experience in a bid/proposal environment
- Provide a reference who can assess your performance on Behavior and Attitude competencies
- Deliver a Proposal Professional Impact Presentation (PPIP)

During this presentation and interview, you will defend your professional contributions to a panel of evaluators, who will assess your impact and your communication and leadership skills.

Professional Certification is designed to assess advocacy with regard to business development best practices. As you review the syllabus, keep in mind that to achieve Professional Certification, you must not only understand and have experience performing each of the required competencies but also be a leader in increasing the application of these competencies within your organization.

## **CONTINUING PROFESSIONAL DEVELOPMENT**

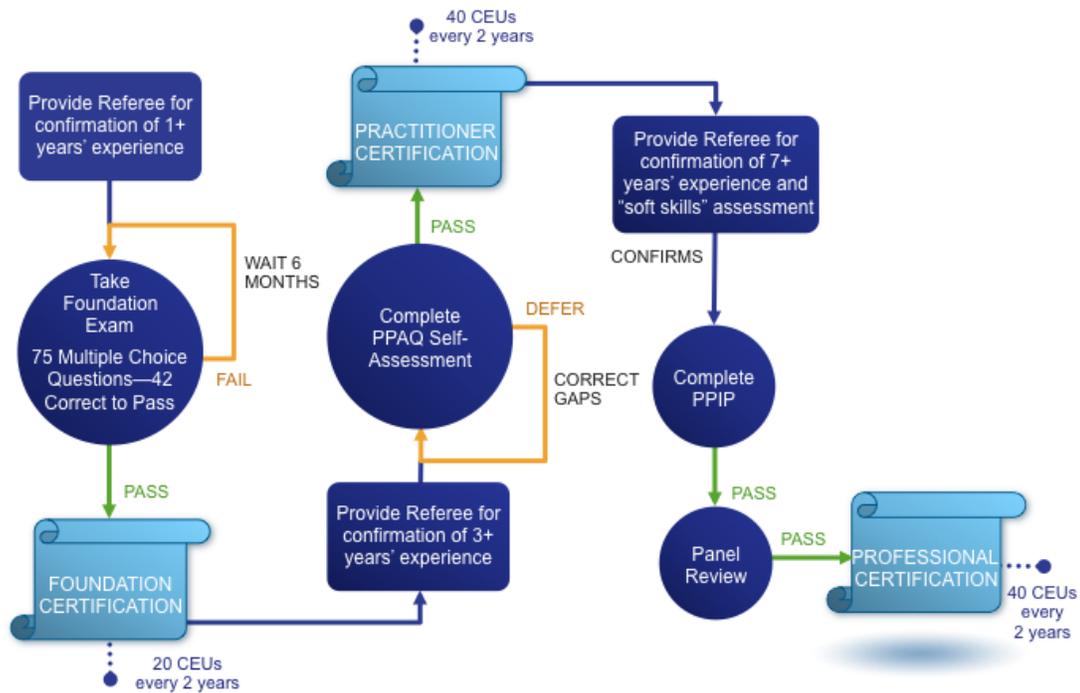
Professional development doesn't end with achievement of a new certification level. All APMP-certified professionals are expected to earn and track Continuing Education Units (CEU). The number of CEUs you must earn depends on your level of certification. Every 2 years, those with Foundation Certification must earn 20 CEUs; those with Practitioner and Professional Certification must earn 40 CEUs.

You can earn CEUs by participating in training; preparing materials, including articles, websites and blogs, conference presentations, and books on business development topics; attending events; volunteering; and studying independently. You are responsible for tracking your own CEUs. Use the Professional Development section of your profile on the APMP website to log your CEUs. CEUs are periodically audited through the site.

# CERTIFICATION LEVELS

## PROFESSIONAL ACCREDITATION PROCESS

Figure 1 illustrates the steps to becoming certified by APMP.



**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.

# LIST OF SYLLABUS COMPETENCIES

CATEGORY	COMPETENCY	FOUNDATION	PRACTITIONER	PROFESSIONAL
<b>INFORMATION RESEARCH AND MANAGEMENT</b>				
<b>Information Gathering</b>	Identify gaps in information.	✓	✓	✓
	Help define a plan for information gathering.		✓	
	Own and operate an information-gathering plan.		✓	✓
	Use senior-level connections/networks to gather information	✓	✓	
	Analyze information gathered from the plan.			✓
<b>Knowledge Management</b>	Use tool(s) to add to and manage the knowledge base.	✓	✓	
	Use existing internal and external knowledge sources for bids.	✓	✓	✓
<b>PLANNING</b>				
<b>Schedule Development</b>	Use multiple tools and methods to develop a proposal schedule.	✓	✓	
	Assess customer timescales and estimate resources required to execute a proposal.	✓		
	Develop a cost estimate for a routine proposal.	✓		
	Match internal proposal tasks to specific bids.		✓	✓
	Assess timescale and resource implications of the customer's procurement process, focusing on efficient use of internal resources.		✓	✓
	Produce cost estimates.		✓	✓
	Define a contingency plan within the schedule.		✓	✓
	Approve a proposal schedule.			✓
	Present a proposal schedule and resourcing requirements internally.			✓
	Continuously monitor and adapt a schedule to reflect internal and external changes.		✓	✓

# LIST OF SYLLABUS COMPETENCIES

CATEGORY	COMPETENCY	FOUNDATION	PRACTITIONER	PROFESSIONAL
<b>DEVELOPMENT</b>				
<b>Opportunity Qualification</b>	Use multiple qualification tools to provide objective data for an initial opportunity qualification decision.	✓	✓	✓
	Manage the bid decision process.	✓	✓	
	Use a consistent method/tool to qualify opportunities.	✓	✓	
	Assess strategic opportunities that require senior stakeholder engagement and/or other business units and/or external partners.			✓
	Present data that has been objectively validated using a consistent method/tool at an opportunity qualification meeting.		✓	✓
	Contribute to continuous qualification decisions.		✓	✓
<b>Winning Price Development</b>	Manage the process to analyze the customer's budget and competitors' prices.		✓	✓
	Help to establish an early winning price target.		✓	✓
	Lead the development of a sound internal business case for positioning customer expectations.	✓	✓	✓
	Identify values to present to the customer in meetings, in the proposal, and in the presentation.	✓	✓	✓
	Define and quantify the values the customer is seeking to achieve.		✓	✓
	Explain the difference between value and price in the proposal.	✓	✓	✓
	Develop quantified, opportunity-specific value propositions that meet customer expectations.		✓	
	Drive the scope of the offer to clearly balance value and price.		✓	
	Lead development of a winning pricing strategy.			✓
	Develop a pricing strategy that reflects a "deal-to-win" (rather than "price-to-win") approach.			✓

# LIST OF SYLLABUS COMPETENCIES

CATEGORY	COMPETENCY	FOUNDATION	PRACTITIONER	PROFESSIONAL
<b>DEVELOPMENT</b>				
<b>Teaming Partner Identification</b>	Use analysis tools to determine whether to use internal and/or external teaming partners.	✓	✓	
	Help identify suitable internal and/or external partners.	✓	✓	
	Recruit internal and/or external partners.		✓	
	Facilitate negotiations for internal and/or external teaming agreements.		✓	
<b>Proposal Strategy Development</b>	Identify multiple analysis tools available to develop a proposal strategy.	✓	✓	
	Schedule proposal strategy development.	✓	✓	
	Use analysis tools to evaluate customer perception of the organization and the competition.	✓	✓	✓
	Use analysis tools to identify the positive and negative discriminators of the organization for the opportunity.	✓	✓	✓
	Develop proposal strategy statements that “ghost” the competition.	✓	✓	✓
	Assign proposal strategy statements within the writing plan.		✓	✓
	Coach others to develop and use proposal strategy statements.		✓	✓
<b>Executive Summary Development</b>	Identify the key elements required to develop a customer-focused executive summary.	✓		
	Use the executive summary as a proposal-briefing tool for others.	✓	✓	✓
	Lead and collaborate in writing of early executive summary.	✓	✓	✓

# LIST OF SYLLABUS COMPETENCIES

CATEGORY	COMPETENCY	FOUNDATION	PRACTITIONER	PROFESSIONAL
<b>DEVELOPMENT</b>				
<b>Content Plan Development</b>	Identify multiple tools and methods available to plan written content for proposals.	✓	✓	✓
	Use multiple writing planning tools and methods for different sizes and types of proposals.	✓		
	Explain the benefits and appropriate use of content development plans.	✓	✓	
	Lead the development and completion of early content development plans.	✓	✓	✓
	Approve sections and/or questions that require content planning.		✓	✓
	Use the content planning process to add structure and include reuse material.		✓	✓
	Coach and brief others on using content development plans.		✓	✓
	Approve a content development plan that follows a customer's required proposal structure.		✓	✓
<b>Requirements Identification</b>	Identify documented customer requirements.	✓	✓	✓
	Identify requirements from customer meetings and documents.	✓	✓	✓
	Identify and develop requirements collaboratively with customer or through sales team.			✓
<b>Compliance Checklist Development</b>	Strip complex requirements from documents issued by the customer.	✓	✓	✓
	Build compliance matrices for both complex and non-complex solutions.	✓	✓	✓
	Drive the internal process to enable decisionmaking for meeting requirements or being non-compliant.		✓	✓

# LIST OF SYLLABUS COMPETENCIES

CATEGORY	COMPETENCY	FOUNDATION	PRACTITIONER	PROFESSIONAL
<b>MANAGEMENT</b>				
<b>Review Management</b>	Explain the purpose and benefits of common functional reviews.	✓	✓	✓
	Organize and participate in common functional reviews.	✓	✓	
	Schedule reviews to meet the size and type of opportunity and customer timescales.		✓	
	Identify and recruit appropriate reviewers.		✓	✓
	Assemble and present information relevant to the review purpose.	✓	✓	✓
	Lead multiple types of functional reviews.		✓	✓
	Ensure that feedback from reviews is acted upon, monitored, and closed.	✓	✓	✓
	Use the content development plan and final document reviews to accommodate for a variety of situations.		✓	✓
<b>Kickoff Meeting Management</b>	Prepare an agenda and documentation for kickoff meetings.	✓		
	Brief kickoff meeting attendees.	✓	✓	✓
	Assign tasks to kickoff meeting attendees.		✓	✓
	Use the kickoff meeting to motivate the proposal team.		✓	✓
	Ensure that the proposal team has complete task descriptions.		✓	✓
	Enlist appropriate senior managers to emphasize the importance of a proposal.	✓	✓	✓
<b>Risk Management</b>	Identify proposal development risks within the schedule.	✓		
	Help establish a proposal development risk management strategy.	✓	✓	
	Obtain management approval of the proposal development risk strategy.		✓	✓
	Implement the proposal development risk management strategy.	✓	✓	✓

# LIST OF SYLLABUS COMPETENCIES

CATEGORY	COMPETENCY	FOUNDATION	PRACTITIONER	PROFESSIONAL
<b>MANAGEMENT</b>				
<b>Report Management</b>	Schedule and develop reports/presentations for senior management and key stakeholders that show proposal progress and identify any arising issues.		✓	✓
	Negotiate solutions with senior management and key stakeholders to resolve any proposal progress issues identified.		✓	✓
<b>Production Management</b>	Plan and schedule the resource, infrastructure, and time required for proposal production.	✓	✓	
	Manage the process for proposal production.	✓	✓	✓
	Create templates for document styles, formats, and visuals.	✓	✓	✓
<b>Lessons Learned Analysis and Management</b>	Obtain internal and external feedback on the proposal.	✓	✓	✓
	Identify systematic proposal process problems and suggest changes.		✓	
	Drive resolution of systemic proposal process problems.			✓
<b>Process Management</b>	Explain the key elements of the proposal development process.	✓		
	Explain the activities required to support the key elements of the proposal development process.	✓	✓	
	Adapt processes to promote work in a variety of situations and opportunities.	✓	✓	
	Lead and drive process improvement.		✓	✓
<b>Virtual Team Management</b>	Explain activities that promote team communication.		✓	✓
	Select tools for managing the virtual proposal process.	✓	✓	✓
	Organize and lead virtual proposal reviews.		✓	✓
	Manage team deadlines.	✓	✓	✓
	Plan workflow to accommodate multiple regions and time zones.	✓	✓	✓
	Organize and manage virtual files.	✓	✓	✓
	Work with team members who are unaccustomed to the virtual team environment.		✓	✓

# LIST OF SYLLABUS COMPETENCIES

CATEGORY	COMPETENCY	FOUNDATION	PRACTITIONER	PROFESSIONAL
<b>SALES ORIENTATION</b>				
<b>Customer Interface Management</b>	Interface directly with internal clients or external customers.	✓	✓	✓
	Manage all communications with internal clients or external customers.		✓	✓
	Discuss all aspects of the proposal with internal clients or external customers.			✓
<b>Opportunity Plan Development</b>	Explain the relationship between the opportunity planning and proposal phases within the business development lifecycle.	✓	✓	
	Use the opportunity plan strategies to drive the development of a proposal strategy within the content development plan.	✓	✓	✓
<b>Winning Strategy Development</b>	Work with others and manage the process to facilitate development of a win strategy.		✓	✓
	Use output from multiple analysis tools to develop the early win strategy.		✓	✓
	Review and adapt win strategies to meet changing circumstances.		✓	✓
	Sell the early win strategy internally and to others involved with the opportunity.		✓	✓
<b>Negotiation Planning</b>	Negotiate for internal resources and/or teaming partner resources.		✓	
	Apply different negotiation techniques in different situations.		✓	✓
<b>Sales Participation</b>	Explain sales methodologies.	✓	✓	✓
	Participate in internal client or external customer meetings.		✓	✓

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CATEGORY	COMPETENCY	FOUNDATION	PRACTITIONER	PROFESSIONAL
<b>BEHAVIOR AND ATTITUDE</b>				
<b>Communicating With Others</b>	Use appropriate interpersonal styles and communication methods to clearly convey messages.		✓	✓
	Use a variety of media to engage individuals or groups.		✓	✓
	Correctly interpret messages and respond appropriately.		✓	✓
	Understand a variety of situations' needs and desired benefits. Develop positioning approaches that leverage supportive factors and overcome/minimize barriers.		✓	✓
	Address the needs of key decisionmakers.			✓
	Interact with prospective customers in a manner that builds effective relationships.		✓	✓
<b>Quality Orientation</b>	Accurately check processes and tasks.		✓	✓
	Identify and take corrective action where necessary.		✓	✓
<b>Building Strategic Relationships and a Successful Team</b>	Develop and use strategic relationships.			✓
	Develop direction and involve others through collaboration.		✓	✓
<b>Decisionmaking and Delegating Responsibility</b>	Explain issues and opportunities and the resulting decisions, then delegate implementation of the required activities and responsibilities.		✓	✓
	Implement decisions/initiate action promptly.		✓	✓
	Include others in the decisionmaking process and ensure buy-in and understanding of decisions.		✓	✓
	Allocate decisionmaking authority and/or task responsibility to maximize organization and individual effectiveness.		✓	✓



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