PMI Registered Education Provider Project Management Institute

Project Managers Network
GPO Box 3558, Sydney NSW 1043, Australia
Fax: (02) 9416-1574
Web: www.pmnetwork.com.au

Opportunity, Bid/ Proposal and Client Management Workshop

Suppliers of services or products need to ensure that they both understand the clients needs and can actually deliver against their promises. This course will help attendees to do both. It emphasises close collaboration between Sales and Delivery groups within the Supplier organisation in order to achieve the best outcomes.

The course covers all aspects including:

- Whether or not we should spend time and resources to Bid
- Planning the Bid
- Teaming with sub-contractors
- Costing and pricing the Bid
- Identifying Risk – both commercial and technical
- Management roles in the Bid and approval process
- Negotiating the contract after the Bid is won

The course also looks at how Suppliers can establish and maintain collaborative relationships with Clients that are mutually beneficial and do not allow the Client to take advantage of their relationship to obtain unfair advantage of the Supplier.

We then look at the broader issues of managing clients either in long term or on specific project basis. It will address such issues as dealing with clients requests for additional free work, or clients not undertaking work they have agreed to do.

Audience:

Project, Bid and Account Managers working for Suppliers

Attendance

Two days from 9.00 am to 5.00 pm with short breaks for morning /afternoon refreshments and for lunch.

A comprehensive set of course notes will be provided to each participant. Several mini case studies, or issues that participants face with their clients, will be used in regular interactive class or group exercises to allow application of the principles discussed.

The course is best conducted in-house to allow focus on the specific organisation environment and circumstances.

Course Outline - Opportunity and Bid Management

Topic	Content
Introduction	• Setting the context – nature of bids/proposals • Terminology (EOI, RFI, RFT, RFP, RFQ etc)
Opportunity Management	• Deciding if to Bid or not – what criteria and process to use
Bid Planning	• Developing the winning bid strategy • The Bid timeframe – extensions
Overview of the Bid Process	• The Bid Plan - major activities • Roles & Responsibilities • The Bid Manager & team • Other resources • Reviews and monitoring progress • Developing the Solution
The Client Relationship	• Managing expectations • Finding the client's real underlying needs • The client's responsibilities
Other parties and Sub-contractors	• Roles • Commercial relationship
Commercial issues	• Questions and answers in formal bid situations • Basic issues to be considered in contracts • Risk assessment categories – technical solution, delivery, client, T&C • Special contract risks and conditions • Developing the cost and pricing model • Alternative pricing models • Possible Risk-sharing options
Reviews	• Q/A of the Bid process • Management reviews and approval of the bid
Developing and Presenting the Proposal	• Bid/proposal formats – client determined • Clients Evaluation criteria • Selling the solution • Bid production – and archiving • Presenting the bid • Bid evaluation
Negotiating the contract	• Starting work prior to contract execution • Negotiation strategies and principles • Preparing for negotiations • Contract development activities
Wrap-up	• Key lessons

Course Outline – Client Management

Prior to this part of the course we will collect from participants issues they face in managing their clients to be used in discussions and exercises.

Topic	Content
Focus on the Client	• Client expectations • Their view of Suppliers • Client's own problems • What are they really looking for?
Typical problems PMs face with Clients	• Collect ideas on problems faced by PM's • Client and Supplier objectives – common and different • What is collaboration? • Key "touch-points" in cycle
Roles / Strategies in Client Management	• Who does what and when • Strategies for managing clients
Client Management activities	• Account Plans • Proposal • Client responsibilities - and staff • Client changes to "scope" • Other changes • Client reporting • Delivery and resourcing • Possible techniques
Selling your value	• Our commitment • Quality of the work • Avoiding extra unpaid work • Identifying other work • Ensuring satisfaction at the end
Exercise	• Some typical client scenarios analysed and discussed
Discussion	• Ways to improve Client management in your organisation