

APMP Proposal Practitioner Assessment Questionnaire (PPAQ) Standards and Guidelines



APMP[®]

ASSOCIATION OF PROPOSAL MANAGEMENT PROFESSIONALS



Candidate Guidance

PPAQ Guidelines

APMP Practitioner level accreditation is designed to assess whether you apply or, have the knowledge to apply, best practice process and procedures defined by the APMP Accreditation competency framework, within your day to day working environment.

Guiding candidates completing the APMP Proposal Practitioner assessment Questionnaire (PPAQ)

The APMP Competency Framework has 5 Key Competency Areas, these are:

- Information Research and Management
- Planning
- Development
- Management
- Sales Orientation

You will see a definition of the Key Competency, written in green at the beginning of each of these areas. Within each Key Competency Area there are a number of individual competencies.

You will see a definition of each of the individual competencies and a list of activities which describe the best practices defined by the APMP. The first thing you will need to do is consider how many, and how often you use the best practices described and provide a rating to indicate your level of experience for the competency.

Key Competency Area: Planning
The Planning KCA involves recognising and planning the necessary activities to produce a bid team and help manage the process and effort and monitor the status during the proposal development phase

PSD: Schedule Development - Preparing a realistic schedule with a time plan of events, a resource plan and an estimate of expenditure requires a clear understanding of each task and the capability of the individuals assigned. The complexity of the schedule will depend on the size of the bid, the number of expertise and the location of all contributors. Scheduling will allow visualisation of the tasks ahead and provides a tool against which progress can be monitored.

I have the ability to:

- schedule activities and plan resource for complex bids.
- develop budget for complex bids.
- construct flowcharts to support the schedule.
- schedule adaptively as circumstances change.
- prepare my own area of responsibility for the future.
- initiate wide ranging action.

Select the response below that best describes the extent to which the above statements describe you

Not at All Marginally Partially Largely Fully

Fig 1 Consider how many of the activities you apply within your role and much you use the associated skills. Mark your PPAQ indicating, honestly, the level of experience you have in the best practice activities.

You will then be asked to provide evidence to support the rating you have given your experience. The evidence required for the assessment is as follows:

To support the above assessment, please provide in 225 words or less details of:-

1. Where and when this skill has been used (code names are acceptable to protect confidentiality)
2. Dates of relevant training courses that you have attended.
3. Any additional supporting information that you would like to offer to assist in the assessment of your competency.

Fig 2 Provide evidence that clearly indicates where, when or how your experience has been gained. Write succinctly and consider the use of bullets to stay within the word count.

When compiling your evidence for each activity, refer to specific proposals where you have used the best practice, using code names where appropriate to protect confidentiality.

Refer to the APMP Standards and Guidelines document to understand which activities you must include evidence for and whether you have experience through application, training, facilitating training or self study.

Showing you have the right experience and are compliant to the standards

You must provide evidence for all the activities marked Mandatory and a designated number of Desirable activities. Refer to the APMP Standards and Guidelines, and read the column headed Assessor Guidelines to understand which activities are mandatory and, the number of desirable activities that require evidence for each competency.

Competency	Assessment Criteria	Application of Experience or Delivery of Training	or Training Received	or Self Study	Assessor Guidelines
Information Gathering	Define and drive the information collection strategy.	D1		U	Candidates must be able to evidence the following in this competency ALL Mandatory (M) areas <i>plus</i> 1 x Desirable (D) in either Application of experience or training received or delivered
	Analyze and relate information from different sources to draw conclusions.	M1	D2	U	
Mandatory and Desirable activities requiring evidence	Identify and coach others to use existing internal and external data sources and identify information gaps.	D3		U	
	Design, own and operate a plan to fill the information gaps.	D4		U	
	Monitor and assist the collection / analysis of high level intelligence / information that requires senior level connections / networks.	D5		U	
	Monitor industry and government regulations	D6	N/A	U	

There are no additional marks for showing evidence for more than the required number of Mandatory and Desirable activities.

Fig 3 First, understand the mix of mandatory and desirable activities that you need to evidence in your PPAQ. *Reference each piece of evidence with the relevant Mandatory or Desirable letter and number to show the activity for which you are providing evidence of application.*

The number of mandatory and desirable activities required to meet the APMP standards, varies in each of the individual competencies.

Use the word count to describe as fully as possible how you apply the Mandatory and Desirable activities you evidence, rather than try to provide evidence for all the activities listed in each competency topic.

Providing a plan to improve yourself and others

You are also asked to provide a plan showing how you will improve yourself and others in each of the Key Competency Areas. The same question is asked 5 times and should be answered each time:

You have now reached the end of the **Planning** KCA; please describe how you intend to improve yourself and others in the competencies of **Schedule Development**. (Answer in less than 150 words).

Fig 4 You do not have to provide a plan that includes all the competency topics in each KCA. *Identify one or two competency areas, and the methods you will use to improve yourself and others.*

It is important that you provide a plan for both, yourself and others. Understanding your strengths and weaknesses in each Key competency areas may help you develop your plan.

- Your strengths are potential areas for transferring your knowledge and improving others
- Your weaknesses are potential areas for improving yourself.

PPAQ Assessment Standards

Competency	Assessment Criteria	Application of Experience	or Delivery of Training	or Training Received	or Self Study	Assessor Guidelines
Information Gathering	Define and drive the information collection strategy.	D1			U	Candidates <i>must</i> be able to evidence the following in this competency ALL Mandatory (M) areas <i>plus</i> 1 x Desirable (D) in either Application of experience or training received or delivered
	Analyze and relate information from different sources to draw logical conclusions.	M1		D2	U	
	Drive and coach others to use existing internal and external data sources and identify information gaps.	D3			U	
	Define, own and operate a plan to fill the information gaps.	D4			U	
	Monitor and assist the collection / analysis of high level intelligence / information that requires senior level connections / networks.	D5			U	
	Monitor industry and government regulations	D6		N/A	U	
Knowledge Management <i>Evidence in this competency of Procurement or supply chain experience is acceptable</i>	Define a knowledge management strategy.	D1		N/A	U	Candidates <i>must</i> be able to evidence the following in this competency 2 x Desirable (D) in either Application of Experience or Training received or delivered
	Use current knowledge management tools.	D2			U	
	Share knowledge and add to knowledge base.	D3		N/A	U	
	Access all internal sources of information.	D4			U	

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Competency	Assessment Criteria	Application of Experience	or Delivery of Training	or Training Received	or Self Study	Assessor Guidelines
Schedule Development <i>Evidence in this competency of Procurement or supply chain experience is acceptable</i>	Schedule activities and plan resource for complex bids.	M1		N/A	U	Candidates <i>must</i> be able to evidence the following in this competency ALL Mandatory (M) areas <i>plus</i> 1 x Desirable (D) in either Application of experience or training received or delivered
	Develop budget for complex bids.	M2		N/A	U	
	Construct flowcharts to support the schedule.	D1			U	
	Schedule adaptively as circumstances change.	M3		N/A	U	
	Prepare own area of responsibility for the future.	D2			U	
Opportunity Qualification <i>Evidence in this competency of Procurement or supply chain experience is acceptable</i>	Contribute to pursuit decisions.	D1			U	Candidates <i>must</i> be able to evidence the following in this competency ALL Mandatory (M) areas <i>plus</i> 1 x Desirable (D) in either Application of experience or training received or delivered
	Drive and make preliminary bid decisions.	D2			U	
	Regularly contribute to validation reviews of the Bid / No bid decision.	M1		N/A	U	
Winning Price Development	Influence and implement a top-down pricing strategy to meet the winning price.	D1				Candidates <i>must</i> show experience for this competency in 3 x Desirable (D) areas Candidates <i>should</i> provide the name of the materials used and a short synopsis of the key learning points and their application if choosing self study
	Plan ahead to negotiating stage.	D2				
	Manage the process for the business case of the approval and sign-off.	D3		N/A		
	Manage the production of the Pricing Strategy Document.	D4				
	Define cost drivers and pricing.	D5				
	Prepare estimating guidelines.	D6				

Competency	Assessment Criteria	Application of Experience	or Delivery of Training	or Training Received	or Self Study	Assessor Guidelines
Teaming Identification <i>Evidence in this competency of Procurement or supply chain experience is acceptable</i>	Recognize the need for teaming partners.	M1		N/A	U	Candidates <i>must</i> show experience for this competency in ALL Mandatory (M) areas <i>plus</i> Candidates <i>should</i> be able to show experience for this competency in 2 x Desirable (D) in either Application of experience or training received or delivered
	Identify the suppliers / partners required.	D1			U	
	Recruit partners and negotiate the agreements.	D2			U	
	Define and agree Statement of Work for teaming / partnering to meet the schedule.	M2		N/A	U	
	Define and agree a communication plan with partners.	D3			U	
	Lead multiple teams balancing conflicts and interests.	D4			U	
Proposal Strategy Development <i>Evidence in this competency of Procurement or supply chain experience is acceptable</i>	Identify how the customer perceives the organization.	M1		N/A	U	Candidates must show experience for this competency in ALL Mandatory (M) areas <i>plus</i> Candidates <i>should</i> be able to show experience of application, training received or training given in 1 x Desirable (D) Area
	Identify the customer's perceptions of the competitors.	M2		N/A	U	
	Identify the +ve and -ve discriminators for the opportunity.	M3		N/A	U	
	Develop proposal statements in a 'what' / 'how' format.	M4		N/A	U	
	Assign proposal strategies to individual proposal sections.	D1			U	

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Competency	Assessment Criteria	Application of Experience	or Delivery of Training	or Training Received	or Self Study	Assessor Guidelines
Executive Summary Development <i>Evidence in this competency of Procurement or supply chain experience is acceptable</i>	Collaborate with Senior Manager to write an early draft of the Executive Summary.	M1	N/A	U	U	Candidates <i>must</i> show experience for this competency in ALL Mandatory (M) areas
	Conduct a high-level review.	M2	N/A	U	U	
	Use the Executive Summary as a bid / proposal briefing tool internally and externally.	M3	N/A	U	U	
	Participate in the review and sign off of the final Executive Summary.	M4	N/A	U	U	
Storyboard Development <i>Evidence in this competency of Procurement or supply chain experience is acceptable</i>	Develop Storyboards as a framework for the proposal.	D1			U	Candidates <i>must</i> show experience for this competency in 6 x Desirable (D) areas in either application of experience, training received or training delivered Candidates <i>should</i> provide the name of the materials used and a short synopsis of the key learning points and their application if choosing self study.
	Drive the process to complete the storyboards.	D2			U	
	Communicate the win strategy for the storyboards.	D3			U	
	Decide upon the sections of a proposal that require storyboarding.	D4			U	
	Assign team members to complete the storyboards.	D5			U	
	Review the content of the storyboards.	D6			U	
	Identify supporting information required for the storyboards.	D7			U	

Competency	Assessment Criteria	Application of Experience	or Delivery of Training	or Training Received	or Self Study	Assessor Guidelines
Requirements Identification <i>Evidence in this competency of Procurement or supply chain experience is acceptable</i>	Analyze Customer documentation and identify anomalies and redundancies.	M1		N/A	U	Candidates <i>must</i> show experience for this competency in ALL Mandatory (M) areas <i>plus</i> Candidates <i>should</i> show experience in application, training received or training delivered in 1 x Desirable area
	Identify and communicate clarification questions to the customer and their responses to the team.	M2		N/A	U	
	Build complex Requirements Matrices.	M3		N/A	U	
	Brief Subject Matter Experts (SMEs) from Requirements Matrices.	D1			U	
Compliance Checklist Development <i>Evidence in this competency of Procurement or supply chain experience is acceptable</i>	Assess the customer evaluation and weighting criteria for the bid.	M1		N/A	U	Candidates <i>must</i> show experience for this competency in ALL Mandatory (M) areas <i>plus</i> Candidates <i>should</i> show experience in application, training received or training delivered in 1 x Desirable area
	Strip complex requirements and build complex compliance matrices, listing each requirement separately	M2		N/A	U	
	Define strategies and plan alternative courses of action to accommodate non-compliance.	M3		N/A	U	
	Discuss compliance with the customer and effectively communicate compliance requirements to team.	D1			U	
	Facilitate regular internal compliance review meetings.	D2			U	
	Monitor compliance of the bid throughout.	M4		N/A	U	

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Competency	Assessment Criteria	Application of Experience	or Delivery of Training	or Training Received	or Self Study	Assessor Guidelines
Outline Development <i>Evidence in this competency of Procurement or supply chain experience is acceptable</i>	Develop a customer focused proposal outline following RFP guidelines.	M1		N/A	U	Candidates <i>must</i> show experience for this competency in ALL Mandatory (M) areas
	Recognize scope for and identify boilerplate.	M2		N/A	U	
	Add extra structure to meet the evaluation and weighting criteria.	M3		N/A	U	
	Recognize a customer focused proposal structure.	M4		N/A	U	
	Recruit writers with appropriate skills for the bid size and complexity.	M5		N/A	U	
	Use the proposal outline to manage control of the writing process.	M6		N/A	U	
Storyboard Review Management <i>Evidence in this competency of Procurement or supply chain experience is acceptable</i>	Plan, schedule and manage Storyboard Reviews, their outcomes and the process.	D1			Candidates <i>must</i> show experience for this competency in 6 x Desirable (D) areas in either application of experience, training received or training delivered Candidates <i>should</i> provide the name of the materials used and a short synopsis of the key learning points and their application if choosing self study	
	Provide the Draft Executive Summary for the Storyboard Review.	D2				
	Chair the Storyboard Review meeting.	D3				
	Coach senior managers on the aims, objectives and purpose of the storyboard review.	D4				
	Promote the active use of storyboarding.	D5				
	Use the Storyboarding process adaptively.	D6				

Competency	Assessment Criteria	Application of Experience	or Delivery of Training	or Training Received	or Self Study	Assessor Guidelines
Kick Off Meeting Management <i>Evidence in this competency of Procurement or supply chain experience is acceptable</i>	Require that a Kick-off meeting be held.	M1		N/A	U	Candidates must show experience for this competency in ALL Mandatory (M) areas <i>plus</i> Candidates should show experience in application, training received or training delivered in 1 x Desirable area
	Direct and chair the kick-off meeting.	D1			U	
	Review, critique and authorise Kick Off meeting presentation and documentation.	M2		N/A	U	
Review Management <i>Evidence in this competency of Procurement or supply chain experience is acceptable</i>	Direct all types of bid reviews.	M1		N/A	U	Candidates must show experience for this competency in ALL Mandatory (M) areas <i>plus</i> Candidates should show experience in application, training received or training delivered in 2 x Desirable areas
	Approve selection of reviewers.	D1			U	
	Ensure all actions from review are closed.	D2			U	
	Promote the active use of defined reviews.	M2		N/A	U	
	Use the review process adaptively.	D3			U	
Risk Mitigation Management <i>Evidence in this competency of Procurement or supply chain experience is acceptable</i>	Ensure that all aspects of risk are recognized.	M1		N/A	U	Candidates must show experience for this competency in ALL Mandatory (M) areas <i>plus</i> Candidates should show experience in application, training received or training delivered in 1 x Desirable area
	Develop and own the risk management strategy.	D1			U	
	Ensure that the bid / proposal risks are documented, articulated, communicated and accepted by senior management as part of the risk strategy.	M2		N/A	U	

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Competency	Assessment Criteria	Application of Experience	or Delivery of Training	or Training Received	or Self Study	Assessor Guidelines
Report Management <i>Evidence in this competency of Procurement or supply chain experience is acceptable</i>	Develop reports / presentations for Senior Management and key stakeholders.	M1		N/A	U	Candidates <i>must</i> show experience for this competency in ALL Mandatory (M) areas
Final Document Review Management <i>Evidence in this competency of Procurement or supply chain experience is acceptable</i>	Direct and lead the Final Document Review.	M1		N/A	U	Candidates <i>must</i> show experience for this competency in
	Identify, recruit and brief appropriate reviewers.	M2		N/A	U	ALL Mandatory (M) areas
	Communicate the Final Document review comments to the bid team.	M3		N/A	U	<i>plus</i>
	Promote the active use of Final Document reviews.	D1			U	Candidates <i>should</i> show experience in application, training received or training delivered in 1 x Desirable area
Production Management <i>Evidence in this competency of Procurement or supply chain experience is acceptable</i>	Ensure and facilitate sufficient infrastructure and resource for the size and complexity of the bid.	M1		N/A	U	Candidates <i>must</i> show experience for this competency in
	Continuously monitor infrastructure and resource against the schedule and develop contingency plans.	M2		N/A	U	ALL Mandatory (M) areas

Competency	Assessment Criteria	Application of Experience	or Delivery of Training	or Training Received	or Self Study	Assessor Guidelines
Lesson Learnt Analysis and Management <i>Evidence in this competency of Procurement or supply chain experience is acceptable</i>	Drive the Lessons Learnt process both internally and externally.	D1			U	Candidates <i>must</i> show experience for this competency in ALL Mandatory (M) areas <i>plus</i> Candidates <i>should</i> show experience in application, training received or training delivered in 1 x Desirable area
	Manage the Lessons Learnt process.	M1		N/A	U	
	Ensure the feedback is captured and documented as Lessons Learnt.	M2		N/A	U	
	Recognize systematic process issues and drive their resolution.	D2			U	
Process Management <i>Evidence in this competency of Procurement or supply chain experience is acceptable</i>	Recognize best practice process, including roles and reviews.	M1		N/A	U	Candidates <i>must</i> show experience for this competency in ALL Mandatory (M) areas
	Exploit process adaptively within organizations.	M2		N/A	U	
Client Interface Management <i>Evidence in this competency of Procurement or supply chain experience is acceptable</i>	Work with sales and have access to the customer to discuss high-level and operational levels aspects of the bid.	D1			U	Candidates <i>must</i> show experience for this competency in 3 x Desirable (D) areas in either application of experience, training received or training delivered
	Participate in resolution of issues with the customer.	D2			U	
	Strategically manage communication related to the bid with the customer.	D3			U	

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Competency	Assessment Criteria	Application of Experience	or Delivery of Training	or Training Received	or Self Study	Assessor Guidelines
Capture Plan Development	Put together a Business Capture Plan.	D1				Candidates <i>must</i> show experience for this competency in ALL Mandatory (M) areas <i>plus</i> Candidates <i>should</i> show experience in application, training received or training delivered in 2 x Desirable areas Candidates <i>should</i> provide the name of the materials used and a short synopsis of the key learning points and their application if choosing self study.
	Use the Capture Planning process adaptively for all types of customers and opportunities.	D2				
	Use the Capture Planning process and information to drive the proposal.	M1	N/A			
	Ensure that the Capture plan contains actions that will advance the proposal.	M2	N/A			
	Ensure that the Capture plan is maintained and evolves throughout the proposal timetable.	D3				
	Define specific actions to implement the Capture Strategy.	D4				
Winning Strategy Development	Manage the bid / proposal win strategy and ensure full traceability and rigor in defining the strategy.	M1	N/A		U	Candidates <i>must</i> show experience for this competency in ALL Mandatory (M) areas <i>plus</i> Candidates <i>should</i> show experience in application, training received or training delivered in 1 x Desirable area
	Ensure that the strategy is continually reviewed to reflect changing circumstances.	D1			U	
	Sell the strategy internally and to partners.	D2			U	
	Define and communicate a vision providing focus and energy for the sharing of knowledge.	D3			U	
Negotiation Planning <i>Evidence in this competency of Procurement or supply chain experience is acceptable</i>	Participate in the early definition of the negotiating strategy.	D1			U	Candidates <i>must</i> show experience for this competency in 1 x Desirable area

Competency	Assessment Criteria	Application of Experience	or Delivery of Training	or Training Received	or Self Study	Assessor Guidelines
Sales Participation	Use different sales approaches adaptively to suit the organization and the customer.	D1			U	Candidates <i>must</i> show experience for this competency in 2 x Desirable areas
	Work with a sales team to influence the customer.					
	Participate in sales strategy development.					
Communication and Persuasiveness <i>Evidence in this competency of Procurement or supply chain experience is acceptable</i>	Use appropriate interpersonal styles and communication methods to clearly convey information and ideas through a variety of media in a manner that engages the audience and helps them to understand and retain the message.	D1			U	Candidates <i>must</i> show experience for this competency in ALL Mandatory (M) areas <i>plus</i> Candidates <i>should</i> show experience in application, training received or training delivered in 1 x Desirable area
	Address messages from others through correct interpretation of their messages and an appropriate response.					
	Seek information to understand situations, needs, and desired benefits and develop positioning approaches that leverage supportive factors, overcome/minimize barriers, and address the unique needs and preferences of key decision makers.					
	Interact with prospects/clients in a manner that builds effective relationships.					
Quality Orientation <i>Evidence in this competency of Procurement or supply chain experience is acceptable</i>	Accomplish tasks by considering all areas. Accurately check processes and tasks; watchful over a period of time and prepared to take corrective and preventive action where necessary.	M1		N/A	U	Candidates <i>must</i> show experience for this competency in ALL Mandatory (M) areas

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Competency	Assessment Criteria	Application of Experience	or Delivery of Training	or Training Received	or Self Study	Assessor Guidelines
Building Strategic Relationships <i>Evidence in this competency of Procurement or supply chain experience is acceptable</i>	Develop and use collaborative relationships to facilitate the accomplishment of work goals.	M1	N/A	U	U	Candidates <i>must</i> show experience for this competency in ALL Mandatory (M) areas plus Candidates <i>should</i> show experience in application, training received or training delivered in 1 x Desirable area
	Develop direction and involve others through working collaboratively with the team and regularly sharing important/relevant information.					
	Seek and expand original ideas, enhance others' ideas, and contribute own ideas for the issues.	D1			U	
Decision Making <i>Evidence in this competency of Procurement or supply chain experience is acceptable</i>	Identify and understand issues as well as opportunities; support the resulting decisions and effectively delegate the implementation of the required activities and responsibilities.	M1	N/A	U	U	Candidates <i>must</i> show experience for this competency in ALL Mandatory (M) areas
At the end of Each Key Competency Area the same question is asked (These two questions Must be answered a total of 5 times)	Describe how you intend to improve yourself	M1				Candidates <i>must</i> show experience for this competency in ALL Mandatory (M) areas
	Describe how you intend to improve others	M2				