

Contact to Contract: Itinerary

Monday, 4 May 2009		Tuesday, 5 May 2009	
10:30 – 12:00	Welcome & Registration	08:00 – 08:30	Croissant Reception
12:00 – 13:00	Introductions & Lunch	08:30 – 10:30	Session Three: ORCHESTRATE
13:00 – 15:30	Session One: IDENTIFY	10:30 – 11:00	Coffee & Tea Break
15:30 – 16:00	Coffee & Tea Break	11:00 – 13:00	Session Four: NEGOTIATE
16:00 – 18:30	Session Two: GENERATE	13:00 – 14:00	Lunch Buffet
18:30 – 19:30	Networking	14:00 – 16:00	Session Five: VALIDATE
19:30 – 21:30	Dinner	16:00 – 17:30	Feedback & Farewell Cocktail

Detailed Agenda: Monday, 4 May 2009

Session One: INITIATE				
Drafting the Business Book – Business Cases in a People’s Business				
SUBJECTS	DELIVERABLE (CONCEPT)	CHALLENGES	PROCESSES & TOOLS	PERSONAL DEVELOPMENT
Productive Target Research	<i>Spur Generators</i>	<i>Information Overflow</i>	<i>Specific Sources</i>	<i>Educating Spur Sourcers</i>
Effective Targeting	<i>Lead Long List</i>	<i>Moving Targets</i>	<i>Funnel Concepts</i>	<i>Refining Probabilities</i>
Effective Communication	<i>Etiquette & Procedures</i>	<i>Resistance, Distraction, Burn Out</i>	<i>Procedures that Work</i>	<i>Exercises, Practices, Specific Exercise Books</i>
Dual Target / Prospect Care	<i>Effective classifications</i>	<i>Follow Up Systems</i>	<i>Delegation Tools</i>	<i>Negotiating with Helpers</i>
Contact Management	<i>Workable personalized solutions</i>	<i>Distractions (Admin & More)</i>	<i>CRM Systems and Time Management Tools, revisited</i>	<i>Adjusting to “normal” work load, Increasing “Face to Client Time”</i>
Tailored Capability Offerings	<i>Marketing & Sales Integration</i>	<i>Organizational, Personal</i>	<i>Focus Groups, Involvement of QA</i>	<i>Brokering between Marketing & Sales</i>

Session Two: GENERATE				
Lead Generation, Lead Qualification, Lead Validation				
SUBJECTS	DELIVERABLE (CONCEPT)	CHALLENGES	PROCESSES & TOOLS	PERSONAL DEVELOPMENT
Value Proposition	<i>USP: Unique Selling Proposition</i>	<i>Differentiation, Authenticity</i>	<i>Continuous USP Review Process</i>	<i>Authoring & Maintaining the USP</i>
Essentials of Lead Generation ...	<i>Multiple Modality Lead Generation Scheme</i>	<i>Effectiveness, Sustainability, Budget</i>	<i>ROI measurements</i>	<i>Self-Assessment Creating “My Mix”</i>
... by Phone	<i>Cold Calling (Phone)</i>	<i>Generation “Don’t Call”</i>	<i>Specific Cold Call Tools</i>	<i>Creating “My Scripts”</i>
....by Email	<i>Email with Credibility</i>	<i>Multidisciplinarity</i>	<i>Bouquet of Materials</i>	<i>Leading the Generator</i>
....by Events	<i>Event & PR Schemes</i>	<i>Assessing Returns</i>	<i>Measurements & Metrics</i>	<i>Improving your ROI</i>
....by New Tech	<i>Blogs, Webcasting, Podcasting, RSS Feeds</i>	<i>Interfacing IT with Marketing & Sales</i>	<i>Discussion of Examples</i>	<i>Critical Self-Analysis Working with IT</i>
Lead Qualification & Validation Management,	<i>CRM, Funnel Tools, “Triage”</i>	<i>Interfacing with Finance, Marketing & Sales, Subsidiaries, Stakeholders.</i>	<i>Enterprise Resource Software, CRMs</i>	<i>Further Study</i>
Lead Regeneration	<i>Former Client Revival</i>	<i>Data Acquisition, Players’ Memory Lost</i>	<i>Archive Mining</i>	<i>Recurrence Rate Assessment</i>

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Session Three: NEGOTIATE The Proposals & Contract Process, Legal Documentation and Processes, Organizing Task Forces, Creating and Maintaining Momentum				
SUBJECTS	DELIVERABLE (CONCEPT)	CHALLENGES	PROCESSES & TOOLS	PERSONAL DEVELOPMENT
Proposal Processes & Instruments	<i>Proposal Process</i>	<i>Timeliness, Accuracy, Confidentiality</i>	<i>Overview of presently used Instruments</i>	<i>My Proposal Flow Chart</i>
Specific instruments	<i>Bid Grids, among others</i>	<i>Compatibility</i>	<i>Mirror Instruments</i>	<i>Further exercises in own organization</i>
Negotiating by Phone	<i>Essential Negotiation Skills</i>	<i>Specific Time Points, Specific Education and Training</i>	<i>Negotiation Check-Lists, "Phone Power"</i>	<i>Negotiation Tracker, Improved Note-Taking Skills</i>
Negotiating by Teleconference	<i>Preparation, Delivery, Report of a Teleconference</i>	<i>Leadership, Facilitation, Misunderstandings</i>	<i>Teleconference Checklists</i>	<i>My Telecon Secrets</i>
Negotiating by Face to Face Meetings & Presentations	<i>Preparation, Delivery, Report of a Capabilities or Proposal Presentation</i>	<i>Purposefulness, Balance between Speaking and Listening After Care</i>	<i>Presentation Checklist</i>	<i>My PowerPoint Book</i>
Contract Process	<i>Confidentiality to Master Services Agreements</i>	<i>Creative Interfacing with Legal Departments</i>	<i>How to work with "Legal" Flow Chart</i>	<i>My Legal Library</i>
Session Four: ORCHESTRATE Before, during and after "THE BID DEFENSE MEETING"; Mobilize the Negotiation Team, Prepare and Deliver Bid Defenses, Care and After Care of Closings, Prepare Recurrent Business				
SUBJECTS	DELIVERABLE (CONCEPT)	CHALLENGES	PROCESSES & TOOLS	PERSONAL DEVELOPMENT
Collecting the Data	<i>Final Proposal, Negotiation Frames</i>	<i>Support from Operations & other departments</i>	<i>Bid Defense Planner Decision Tree, Gap Lists</i>	<i>Organization & Planning "proof" Schedules</i>
Composing the Front Team	<i>The Dream Team Balanced Risk Taking</i>	<i>Identifying and knowing the Buyer Committee</i>	<i>Negotiating with "Senior" Management</i>	<i>Tenacity: The Power of Persuasion</i>
Organizing the Defense Room at Home	<i>"Necessary & Sufficient" Help, and paying for it</i>	<i>Conflicting agenda's Lack of interest</i>	<i>Rallying for Support Quid pro Quos</i>	<i>Dealing with Resistance</i>
Coping with Questions	<i>Weaknesses & Threads</i>	<i>Spelling out a common understanding</i>	<i>Role distribution Script versus Play</i>	<i>My Q&A Bible Ultimate Improvisations</i>
Following Up - properly	<i>Feed Back and Scheduled Further Steps</i>	<i>Obtaining commitment – from all players</i>	<i>Mapping the Steps</i>	<i>Engineering Signature Circuitry</i>
Closing deals in due course	<i>Closing Calendar</i>	<i>Hidden Agenda, Reorganizations, Turnover</i>	<i>Effective Closing Skills</i>	<i>My Closing Scripts</i>
Legal Aspects, Signature Chasing	<i>Legal Documents and Amendments</i>	<i>Simultaneity of Progress with Closing Process</i>	<i>Signature Process Mapping</i>	<i>Understanding of Legal Pathways</i>
Session Five: VALIDATE Handing Over Without Losing Grip, Change in Scope Management, Recurrent Business, Intensive Care Networking, Partnering Paradigms				
SUBJECTS	DELIVERABLE (CONCEPT)	CHALLENGES	PROCESSES & TOOLS	PERSONAL DEVELOPMENT
Handing Over to Operations	<i>Coordinated and documented Process</i>	<i>Smoothing out Transition Matters</i>	<i>Proposal & Closing Flow Chart</i>	<i>My Transition Charter from the Project Timer</i>
Validating Agreements and Scheduled Events	<i>Assessment of Project deliverables</i>	<i>Following without Interfering</i>	<i>Future Event Check List Periodical Review</i>	<i>Creative Change Order Generation</i>
Reiterating by cross-selling	<i>Additional Leads/Projects</i>	<i>Identifying across complex organizations</i>	<i>Genuine Curiosity & Continuous Research</i>	<i>Organization Charts are BD's best Friends</i>
Reiterating by up-selling	<i>Extending from Project to Program</i>	<i>Meeting the "Next Executive Level"</i>	<i>Relationship Nurturing</i>	<i>Reliability, Regularity, My Flat Rate Tricks</i>
Reiterating by Change Order	<i>Adjust Scale & Scope to Client Needs, both ways</i>	<i>Common Understanding of Actual Scope</i>	<i>Dialogue, also with Operations</i>	<i>Change in Scope Tracker Good Old Fax</i>
Partnering Paradigms	<i>Extended Range Collaborations</i>	<i>Medium & Long Term Commitments</i>	<i>Governance Bodies, Controlling Tools, Legal</i>	<i>Further Reading</i>
Nurturing Leads beyond Organizations	<i>Keeping track of Everybody</i>	<i>Staff Turnover, Mobility, Data Protection Laws</i>	<i>Recurrent Personal Contacting, Tools</i>	<i>My Address Book</i>
Moving Up, Leaving, Contingency Planning	<i>Orderly Transition</i>	<i>Leaving a Lasting Impression</i>	<i>Transition Plan, Handover Schedule</i>	<i>My Legacy</i>