



Winning E-Learning Proposals



The Art of
Development
and Delivery

Karl M. Kapp, Ed.D.

Co-published with the
Institute for Interactive Technologies

Winning E-Learning Proposals:
The Art of Development and Delivery

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DEDICATION

*To all students of the E-learning Business Acquisition Process
wherever they are and in whatever role they play.*

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FOREWORD

WINGING IT

Even though it was over a decade ago, I remember the scene like it was yesterday. I had managed to secure a meeting with one of the best-known financial services companies in the country through a referral from a friend of a friend. Only a few months earlier I had started my own custom content development company out of a spare bedroom, and to date had nothing tangible to show for it other than one employee and a stack of business cards. For us, this meeting was big. While this particular project was only a two-hour CBT program, we badly needed to land our first client, not only to pay the bills, but also to get other clients.

As my entire workforce and I walked into the posh lobby of our new prospect, I realized we were pretty nervous. Although we felt confident that we could hold our own talking about the multimedia and design aspects of the proposed program, we did not really have an exact plan for winning the business from the client. We were just going to discuss how we would build the training and hoped that they liked what they heard.

These were the early days of our industry. The term “e-learning” would not be coined for several years, and there was no such thing as the World Wide Web. Therefore, the whole process of securing business, pricing, and producing work was a constant exercise in trial and error, and any knowledge of the process of securing business from clients was incredibly secretive and proprietary.

Resigned that we would just have to “wing it,” we marched into the office suite and were asked by the receptionist to wait outside the cubicle of the person with whom we were meeting. Within a few seconds we realized, much to our horror, that she was having a meeting with the CEO of one of the best-known content development companies in the industry. We had seen this guy speak at

industry meetings and read articles he had written. His company had an impressive client list and dozens of employees. Suddenly, our nervousness doubled.

We realized we had not formalized any strategy for winning the business, while he was clearly articulating a well-developed, well-thought-out strategy. With our meeting only minutes away, and a competitor clearly adhering to a well-developed capture strategy, we needed our own strategy and fast. We nervously glanced at each other wondering how to develop a successful strategy in less than five minutes to counter an industry leader.

However, we were about to get extremely lucky. While cubicles have their overall benefits and drawbacks, at that moment I discovered something about these cloth-walled structures that ultimately proved extremely helpful to us winning this project. Cubicles are not soundproof.

As our competitor loudly and proudly discussed the benefits of selecting his company for this project, the strengths of his organization, and the process it used to secure business, we could not help but overhear his strategy for winning the business.

My partner and I looked at each other, smiled, and quickly hatched our own strategy. We would highlight our strengths, go after our competitor's weaknesses, and focus on producing the project within the client's budgetary constraints. Although we could not be sure that our competitor would propose exactly what he had discussed that day, we were pretty sure that our hasty strategy would at least keep us in the game. We had no other basis upon which to develop a strategy. We just had to think fast and wing it, but at least we now had a semblance of a strategy.

Our "make-do" strategy worked, and a few weeks later we were awarded the business. It was that deal that helped us, over the next few years, to become one of the best-known content development companies in the industry. To this day, that financial services company remains one of our largest clients.

Now, I am not particularly proud of how we won that first deal, nor do I advocate the "winging-it" method of selling e-learning. Today I consider our practices to be the most ethical in the industry, and my sales force typically has a well-developed strategy for capturing the business long before they meet with a prospect. However, in those early days everyone was making it up as they went along. There was no clear process for fairly and objectively presenting your business case to clients. We often refer to that time as the "Wild West" because of the unstructured way that vendors and buyers consummated deals.

A STRATEGY IS NOW AVAILABLE

Clearly the e-learning industry has matured. Buyers have become more and more sophisticated in developing Requests for Information and Requests for Proposals

and in their overall vendor selection process. In order to continue to win business, over the years our company and others steadily developed targeted sales practices and proposal skills to keep pace with the industry's evolution. In fact, vendors often differentiate themselves by their sales processes and proposals and consider these to be core, strategic assets.

Today, the process for acquiring business that used to be so incredibly secretive, and which takes new companies years to learn, is clearly laid out in *Winning E-Learning Proposals: The Art of Development and Delivery*. This is the first book in a co-published series between J. Ross Publishing and the Institute for Interactive Technologies at Bloomsburg University. For years the Institute has been instrumental in preparing students for careers in technology-delivered learning, and their graduates can be found in leading companies across the industry helping them to develop effective e-learning and to strategically capture business. For the first time, this wealth of experience has been captured by Karl Kapp in this comprehensive book.

This is the only book that I have come across that fully describes the entire process for securing e-learning business. Coined “E-BAP” for E-learning Business Acquisition Process, Dr. Kapp lays out easy-to-comprehend steps for vendors and buyers alike. Understanding this process will assist vendors in securing business, as well as buyers who want to communicate their needs more effectively.

This book not only contains information on how to develop a proposal, it also contains information on how to estimate a project and how to schedule resources. It can be equally useful to a salesperson trying to win business and a project manager who needs to understand how to estimate a project. This book also serves as a good review for instructional design students of all kinds in order to gain a complete understanding of how the business acquisition process works.

As the title suggests, *Winning E-Learning Proposals* contains a great deal of information on one of the most important aspects of securing e-learning business: the proposal. The tips and techniques in the book are extremely useful to novice proposal writers who want to learn how to develop winning proposals. Seasoned veterans can pick up new ideas and insights from the examples of actual proposals contained in the book. The worksheets throughout the book guide a proposal development team through the entire proposal writing process.

For salespeople, the book contains valuable information on how to position their company's offerings and effectively sell their e-learning solutions. The insights and ideas from multiple professionals in the field — from both the vendor side and the client side — give the book different perspectives on the e-learning business acquisition process. Most importantly, these ideas are helpful in setting a company's solution apart from the myriad competitors in the field.

While it is easy to wax nostalgic about “the good old days,” this book erases the rudimentary sales processes of the early e-learning industry and, for the first

time, makes available the strategies that leading companies are using to win and develop e-learning business. All in all, the lessons taught in this book will help e-learning professionals develop winning strategies that they can build on and evolve as their business evolves.

Whether you are a buyer or a seller, I wish you the best of luck in your e-learning endeavors. And for the vendors out there, I have one important piece of advice learned early in my career: when meeting with a prospect in a cubicle, speak softly. You never know who might overhear.

*Kevin Oakes, CEO
Click2learn, Inc.*

PREFACE

WHY READ THIS BOOK

The business of e-learning is competitive, cut-throat, and constantly changing. To stay ahead, you must remain current and focused on winning business through effective proposal writing and dynamite sales presentations. This holds true whether you are selling e-learning to your boss or to a potential client. You need a road map to navigate the difficult process of selling e-learning. This book helps you develop and articulate strategies for winning e-learning business that is “up for grabs” in the competitive \$50 billion training industry.

WHAT IS IN THIS BOOK

Winning E-Learning Proposals: The Art of Development and Delivery meets the needs of professionals assigned the task of developing, writing, and presenting e-learning solutions. It is designed to provide step-by-step practical tips and techniques to conceptualize a winning idea, write a winning proposal, and stage a winning presentation.

While many people view the e-learning proposal and presentation process as more art than science, the fact is that winning techniques and formulas can be codified and presented in a logical and repeatable pattern — as much as 90% of the process is mechanical and rote. In this book, these mechanical elements have been turned into a science: a listing of items expected and anticipated in an e-learning proposal.

Mastering the mechanics is important, but it is the last 10% — the art — that separates the winning proposals from the losers. The last 10% is still, and always

will be, pure *art*. To win e-learning proposals time and time again, you need to know the techniques of “master proposal artists.”

Winning E-Learning Proposals contains over a dozen vignettes from “master proposal artists” who deal with RFPs, proposals, sales presentations, business cases, and the e-learning business acquisition process on a daily basis. These professionals are from both the vendor and the client side of the business. They are founders of e-learning companies, e-learning project managers, vice presidents, operations managers, and instructional technologists. The vendor and client perspectives provide a holistic view of winning e-learning proposals. These e-learning veterans understand how to win. The result is a book that describes a proven process that can net your organization millions of e-learning dollars, just as it has for the professionals who contributed to this work.

HOW TO READ THIS BOOK

An ideal method of reading this book is as a team. Divide your firm into teams and have each member read Chapter 1 and then each team member can read a different chapter. Each week the teams can get together and discuss the salient points. This method strengthens your firm’s proposal writing and increases your proposal hit rate. It provides a common dialogue for your team and increases awareness of the issues involved with e-learning.

This book can either be read cover to cover to understand the entire process or used as a reference to pinpoint exactly the piece of advice you need to “seal your next deal.” The book is organized around the E-learning Business Acquisition Process (E-BAP). The E-BAP is the method by which e-learning firms secure business. It is a predictable process with each stage carefully explained throughout the book in three distinct but interrelated parts.

Part I describes the preliminary work that must be done before e-learning firms can effectively respond to an RFP. This part contains advice and counsel on obtaining e-learning RFPs, reviewing the RFP to see if it is worth responding to, defining the problem described by the potential client, and conceptualizing a solution. It also contains instruction on good writing, team writing, and the effective use of graphics within a proposal. These foundational elements are the basis for writing an effective proposal.

Part II describes each section of an e-learning proposal and explains how to write the document and what should be contained in each section. It provides checklists and advice on crafting an e-learning proposal so that you win business. Each chapter in this part contains proposal samples based on actual proposals. These samples provide ideas and concepts for the proposal writing team to consider.

Part III focuses on the presentation portion of the E-BAP. Few books in the field of e-learning discuss effective methods for selling your solution to e-learning clients in the context of a sales presentation. This part of the book provides both novice and experienced professionals with tips and techniques for being successful.

WHO SHOULD READ THIS BOOK

This book has been written to satisfy a diversity of audiences interested in the E-BAP and how it relates to winning proposals. Each audience will approach the book from different angles and viewpoints and each will read the book with different goals in mind. The writing style of the book and its organization have been specifically designed to enable different readers to use the book in a manner most appropriate for them.

NOVICE E-LEARNING SALESPEOPLE

This book will guide the novice e-learning salesperson through the entire E-BAP. The concepts, ideas, and techniques in this book will literally take years off of the learning curve for understanding what clients want in proposals, how you should develop a solution, and how to present your solution in a sales situation. Reading Chapter 1 (The E-Learning Business Acquisition Process) will provide you with a good overview of the entire process and then you can proceed chapter by chapter to gain additional knowledge. Understanding the process will help you write your first winning proposal.

EXPERIENCED E-LEARNING SALESPEOPLE

Sometimes winning a proposal comes down to one or two details that are either overlooked or missed in the proposal process. This book reminds experienced salespeople about those details and also provides some insights into new methods of winning business.

As an experienced salesperson, you will want to turn to specific chapters of interest to gain insight or knowledge pertaining to a specific part of the process. For example, Chapter 9 covers the topic of a letter of transmittal. The chapter includes information on eight items that should be in every letter. Unfortunately, most proposal writers leave out one or two elements — potentially costing them the business. This book serves as a reminder to include all eight items and explains why those items should be included. *Winning E-Learning Proposals* is a reference book that provides checklists and worksheets to trigger the veteran to consider new ideas or concepts in his or her e-learning proposals.

ANYONE PREPARING AN E-LEARNING RFP

While it is important to write a good proposal to win e-learning business, good proposals start with good RFPs. Reading this book will help any internal person who is struggling with trying to write a good RFP. Of particular interest to this audience will be Chapter 3. This chapter describes common errors in most RFPs and provides advice from vendors on how to develop an effective RFP that allows you to make a fair and objective decision. Chapter 6 provides solid advice on writing styles and techniques that are as effective for RFPs as they are for proposals.

By reading this book as a potential customer of e-learning vendors, you will also get to look “behind the curtain” at how vendors prepare e-learning proposals and what types of issues they consider when presenting a solution. You will know what to look for in a proposal and how vendors go about pricing their products and services. You will understand the E-BAP better and be able to make more intelligent decisions regarding e-learning.

ANYONE “SELLING” E-LEARNING INTERNALLY

Not only is e-learning sold to clients but, many times, you must sell e-learning internally. This book helps managers, supervisors, and others develop a solid business case to sell e-learning to top executives and others within their organization.

One of the first steps in the process of selling e-learning is to create a business case and describe how e-learning will positively impact the organization. Chapter 15 provides the tools you need to develop an effective business case for the e-learning investment not from a cost-savings perspective but from a performance improvement perspective — a much stronger sell.

Chapter 4 provides ideas and techniques for defining your organization’s e-learning needs so you can present them to internal management. Understanding the entire E-BAP will help you to describe the process to management so it understands what internal resources are needed to put e-learning in place. You can also use the information from Chapter 14 to learn about the average price for e-learning products and services.

CHIEF LEARNING OFFICERS

As a chief learning officer, you have numerous organizational responsibilities, and one of those responsibilities is to make intelligent choices regarding e-learning. Chapter 12 describes both instructional design elements and technological elements needed for an effective e-learning solution. The chapter also contains descriptions of requirements you should look for when considering an e-learning solution for your organization. This book will provide a holistic view of e-learning.

ing and insight into e-learning considerations from leading professionals working in the field.

PROJECT MANAGERS

If you are an internal or external manager for an e-learning project, this book can help. Chapter 13 describes four methods for estimating the amount of time it will take for you to complete an e-learning project. This can help you scope a project before you begin work. Chapter 8 describes what it takes for a team to learn to work together to produce desired results. The book will help you with the difficult task of using a team to develop an e-learning solution. You will also learn about the budget process as well as how to deal with some technical issues concerning e-learning.

ENTREPRENEURS

If you are just starting an e-learning business or thinking of starting one, this book describes what you need to be successful. You will want to read Chapter 2. This chapter describes how to get RFPs for e-learning and how you can ensure a steady flow of RFPs into your organization. Once you get a steady flow of RFPs, use the rest of the book to begin winning those RFPs.

CONSULTANTS

There is money to be made in helping organizations write e-learning proposals. This book provides the worksheets, tips, and examples needed for you to help a client write an e-learning proposal. If you are selling services as an e-learning strategist, this book helps you develop a strategy and a direction for your clients by providing insight into what clients want and what vendors are able to offer. Of particular interest is Chapter 5, which will help you work with the client to brainstorm ideas related to e-learning.

INSTRUCTIONAL DESIGN STUDENTS

This book is a textbook for instructional design students who want to know how the design process is applied “in the field.” If you are a student learning about the business of e-learning or if you are an instructional design student, this book describes, in detail, how the E-BAP works. It is one thing to know about the theory of instructional design; it is another to learn how to *sell* it to a potential client. Students will gain a huge advantage by understanding the business side of the online learning industry. As a student, you will be able to use the knowledge gained in this book to sell yourself to a potential employer because you will know

the industry lingo, the trends in the industry, and the direction in which you need to go to be successful.

EMPLOYEES IN E-LEARNING FIRMS

Ideally everyone within an e-learning firm involved with writing a proposal will own a copy of this book...from the sales force to instructional designers to graphic artists to Web designers. *Winning E-Learning Proposals: The Art of Development and Delivery* is a ready reference for answering questions, crafting responses, and helping the organization win business. It also contains information about instructional design, technological considerations, and other critical day-to-day aspects of working within an e-learning firm.

THE BOTTOM LINE

Effective proposal writing is imperative for e-learning success. *Winning E-Learning Proposals: The Art of Development and Delivery* provides you with the knowledge, advice, and insights required to win e-learning proposals.

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THE AUTHOR



Karl M. Kapp, Ed.D., CFPIM, CIRM, is a scholar, consultant, and expert on the convergence of learning, technology, and business operations. His background teaching e-learning classes, knowledge of adult learning theory, and experience training CEOs and front line staff provide him with a unique perspective on organizational learning.

Karl understands how to promote effective e-learning within an organization. He received his Doctorate of Education in Instructional Design at the University of Pittsburgh in Pittsburgh, PA. The field of Instructional Design focuses on the systematic design, development, delivery, implementation, and evaluation of instruction.

As Assistant Director of Bloomsburg University's Institute for Interactive Technologies (IIT), Karl helps organizations such as Aetna, CIGNA Healthcare, the Pennsylvania Department of Public Welfare, and L'OREAL understand how e-learning technologies impact employee productivity and learning.

As Associate Professor of Instructional Technology at Bloomsburg University, Karl teaches a unique class. Students are formed into "companies," write a business plan, receive an e-learning Request for Proposal (RFP), respond with a proposal, develop a working prototype, and present their solution to representatives from various corporations. Typical corporations represented include Click2Learn, CIGNA Healthcare, Merck, Newton Gravity Shift, EduNeering, Bristol-Myers Squibb, Verizon, and others. Karl was instrumental in forming Bloomsburg's online E-Learning Developer's Certificate which provides online education to traditional instructional designers who want to transition to developing online instruction.