

Clinical Trial Education Institute



**Helping clinical trial teams compete smarter,
present stronger, and win with greater confidence.**

*A specialized education and advisory partner for
RFP-strategy excellence.*



Why Partner with CTEI?

The investment gap sits at the point where opportunity converts into CRO revenue.

CROs fund the pursuit engine and operational readiness—but underprepare the revenue-conversion moment.

WHERE CROs INVEST

PURSUIT INFRASTRUCTURE

Proposals • Pricing • Tools • Business development

OPERATIONAL READINESS

Protocols • Monitoring • Systems • SOPs

GAP #1

UNDERTRAINED

Proposal
team
training
+
buy-in

GAP #2

UNDERTRAINED
UNDERFUNDED

Bid-defense
knowledge
+
training

WHAT'S AT STAKE

CLIENT DECISION

**Revenue
Is Won Here**

**Teams reach the most consequential client meeting trained to deliver the work
*but are not trained to win it.***

What Gap Does CTEI Solve?

Strong capabilities can still leak value before the bid room.

Capabilities are not the problem. Translation is.

Expertise loses commercial force when it is not shaped into one coherent, buyer-ready story.



The missing discipline: pressure-tested, buyer-ready storytelling.

CTEI closes the gap between knowing the work and winning the room.

Strategic Support Across the RFP Lifecycle

The right solution at the right stage for your team

Modular offerings can stand alone or combine into a pursuit-readiness program.

Structured Training

Teach the RFP-to-win process: early engagement, proposal strategy, team alignment, and bid defense basics.

Best for building baseline capability across teams.

Advisory Workshops

Prepare for high-value pursuits, pressure-test strategy, and sharpen the client-facing narrative.

Best for live opportunities that matter.

Executive & Team Coaching

Develop confidence, presentation discipline, decision-making, room reading, and professional etiquette.

Best for leaders and presenters under pressure.

The end result is better-prepared teams, sharper win themes, stronger proposal discipline, and more confident bid defenses.

CTEI Services

Providing support from the most junior to the most senior bid teams



1 Bid Defense
Crash Course

3 Bid Defense
Readiness Lab

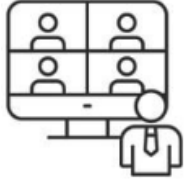
2 Proposal Strategy
Bootcamp

4 RFP-to-Win
Advisory Sprint



Bid Defense Crash Course

An immersive, self-paced course for those new or inexperienced to a bid defense



For CRAs to Executives, where time is of the essence. For those team members inexperienced in bid defenses, or those simply needing a refresher, or individuals looking to add an important, industry-certified course to their CV.



A fast, high-impact training session designed to help professionals and teams sharpen bid defense performance before a live client presentation. This course focuses on the essentials: **message discipline, team alignment, confident delivery, client psychology, and avoiding common bid defense failure points.**



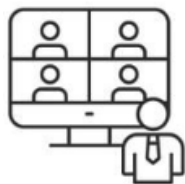
Self-paced, 100% online, pre-recorded course from 30-minutes to 2-hours in length.

Can be customized around a specific opportunity, delivered remotely live, or delivered as general readiness group training upon request.



Proposal Strategy Bootcamp

A structured program teaching the art of building more competitive clinical trial proposals



For proposal managers, business development teams, clinical strategy leads, therapeutic area leads, operations leaders, feasibility teams, pricing/budget contributors, medical/scientific contributors, and functional proposal SMEs



From the earliest stages of opportunity development through final submission, the Bootcamp focuses on **strategy, differentiation, client alignment, solution design, and converting RFP requirements into a persuasive proposal narrative**. The offering can include sample RFPs, live exercises, proposal critique, and applied strategy workshops.



Instructor-led, remote or in-person program.

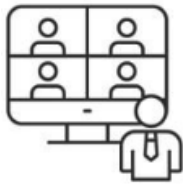
Can be delivered as a half-day, full-day, or multi-session Bootcamp.

Optional independent pre-work may include RFP review, proposal samples, or opportunity strategy worksheets.



Bid Defense Readiness Lab

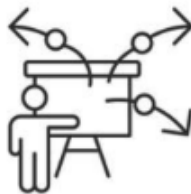
An applied, rehearsal-based training lab designed for high-stakes bid defense meetings



For full bid defense teams, including executive sponsors, business development, clinical operations, project leadership, therapeutic strategy, medical/scientific leads, data management, biostatistics, regulatory, feasibility, patient recruitment, and other functional presenters to maximize the team's readiness for delivering the most compelling message to a potential client.



Unlike a general training course, the Readiness Lab focuses on *live practice, feedback, message refinement, presenter coaching, and team performance under realistic client-facing conditions*. The Lab can be tailored to a specific RFP, sponsor, therapeutic area, or competitive situation.



Remote or in-person facilitated lab.

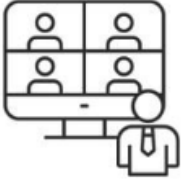
Best delivered as a half-day or full-day working session, or as multiple shorter sessions leading up to a live bid defense.



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RFP-to-Win Advisory Sprint

A fast-moving analysis of the key elements of the RFP process, from reviews to budgets



For executive sponsors, business development leaders, proposal leaders, clinical strategy teams, therapeutic area leads, operations leaders, pricing/budget teams, feasibility, recruitment, regulatory, data management, biostatistics, and core pursuit team members



A focused advisory engagement that helps CRO, biotech, or clinical development teams improve the strategy, structure, and competitiveness of a specific RFP response. ***The Sprint is designed to move quickly from opportunity assessment to win strategy, proposal positioning, team alignment, and bid defense preparation.*** CTEI partners with the team during a defined RFP pursuit window.



Advisory sprint delivered remotely, in person, or hybrid.

Typically structured over several days to several weeks depending on RFP timeline.

Includes live working sessions, strategic reviews, written feedback, and optional bid defense preparation support.



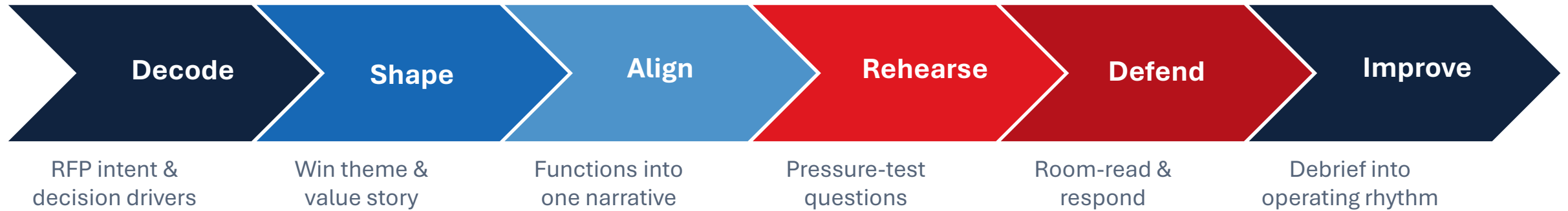
The CTEI Method

From early pursuit through to the final pre-award conversation

01 SHAPE THE STORY

02 WIN THE ROOM

03 LEARN & REUSE



REUSABLE ASSETS

Pursuit brief • Bid Defense Playbook • Rehearsal Rubric • Debrief Loop



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Set up a meeting with our team today to learn more about our capabilities and how we can help you maximize your team's potential.

#rfpconversion