



A Guide to Winning Proposal Methodologies

ESSENTIAL STEPS TO CREATING HIGH-QUALITY PROPOSALS AND INCREASING YOUR WIN RATE



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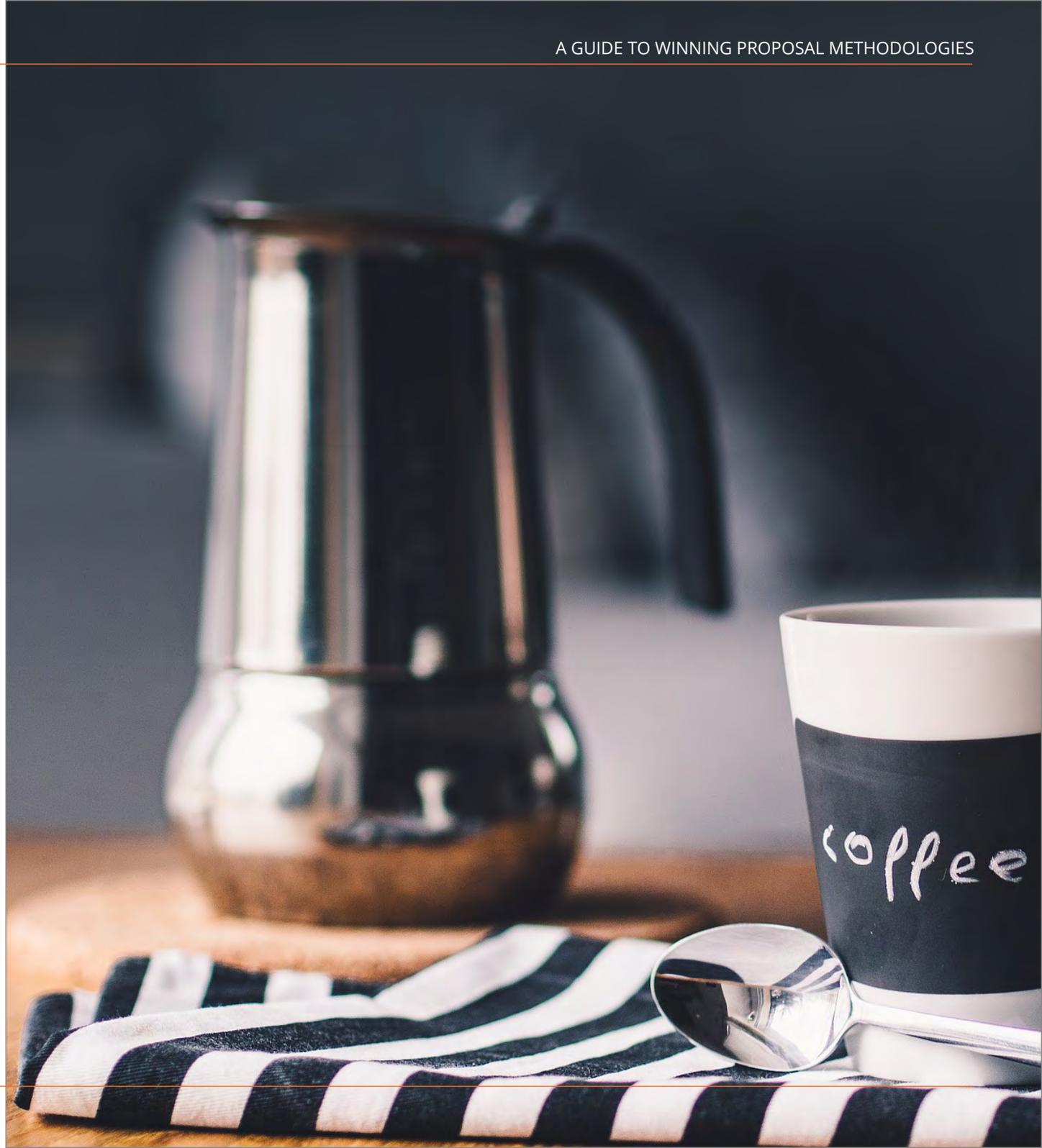
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INTRODUCTION

WHAT ARE PROPOSAL PROCESSES AND CAN THEY REALLY IMPACT BUSINESS GROWTH?

Love them or hate them, proposals are an essential part of any successful business sale. Unfortunately, many people think they're just boring reams of paper that are something to tick off the list as your buyer moves closer to purchasing from you. But the reality is that they can make or break a deal, and even a brand.

The impression made by a well-crafted, accurate, and comprehensive proposal will define how your prospect views your sales team and your company, and will color all future dealings. It's the first piece of proof that your business is run by intelligent, capable people who put their customers first and pay attention to detail. Organizations that employ proposal managers and writers understand this – there's a lot that businesses of all sizes can learn from proposal specialists. In this introductory guide (the follow-up to our Guide to Winning Proposal Writing) we will look at the basic proposal processes that

every business that regularly responds to RFPs should consider implementing. Our foundation is the Shipley process, which you can read more about at [here](#) and we also recommend following the Association of Proposal Management Professionals (APMP) best practice, which you can learn about [here](#) or by attending their international conferences.



CHAPTER 2

THE BASIC PROPOSAL PROCESS

One of the most widely recommended and used proposal processes was developed by Shipley Associates. The entire process, which you can read more about [here](#), contains 96 steps. But as with any process, it's important that you tailor it to suit your own business – simplifying it as much as possible and ensuring that it is helpful and practical, rather than confusing and painful.



Many of the steps in the full process may be unnecessary for your business so as a start, we recommend considering the following seven basic steps:

1. Think carefully about whether or not you should bid.

This stage, also referred to as the 'capture' stage, is where you should always start. It's tempting to bid for every project, but if you're determined to only send out high-quality proposals and RFP responses, then you need bear in mind that producing that content requires a lot of skill and time – and therefore money. You want to make sure that your business stands a chance of winning the bid before you go through all that. It's also worth remembering that if you keep bidding for projects or contracts that aren't relevant, or that your business won't be able to service properly, your employees will start to feel demotivated.

So take the time to read through the RFP carefully. If your company does not completely cater to the requests set forth, or if you would like to focus on different bids, deals or business, then opt out – it really is okay.



2. If you decide to go ahead, you'll need an actionable 'win strategy'.

If, after capture planning, you decide to go ahead and bid, you'll need to work out a plan of action for giving your business the best chance at success.

Before you think about writing content, set up some time with key stakeholders and develop a strategy that will set your RFP response apart.

A good place to start may be to gather as much information about the prospect's business as you can find. What are their biggest pains? Do they have an annual report that highlights their current goals? Have they recently undergone any internal restructuring that may shape what they're looking for? What was their experience with the previous vendor? This is where good networks and relationship building can set you apart.

What are the two or three key messages that you want the prospect to take away from your proposal? What is the one thing that you need to communicate in your response that will show that you understand what they are trying to achieve?

CapturePlanning suggests creating a **Content Plan** in which you plan out what you need the authors to achieve in each section.

Once you have formulated your win strategy, document it and share it with others.

3. Share your win strategy with others.

Identify a few key people from across the business who you think could add value to the process by checking that you are on the right track. Doing this before the proposal is written will give your writer clear direction and reduce the number of edits to the final document, speeding up the entire process.

Shipley calls this team the **pink team**.



4. Get subject matter experts involved.

Now it's time to gather and organize the information you need to include in the proposal. If you use a proposal or content management solution, you might already have answers stored in it, that you can ask subject matter experts (SMEs) to review or update.

This part of the process takes careful management as it requires a group of people to work together and deliver answers by a certain date. Roles, responsibilities, and deadlines need to be clearly communicated up front, and progress needs to be checked regularly, or even daily.

Proposal management software can streamline this stage by enabling the project manager to allocate tasks to SMEs, and add their responses directly to the RFP response document or proposal template, without having to leave the document.

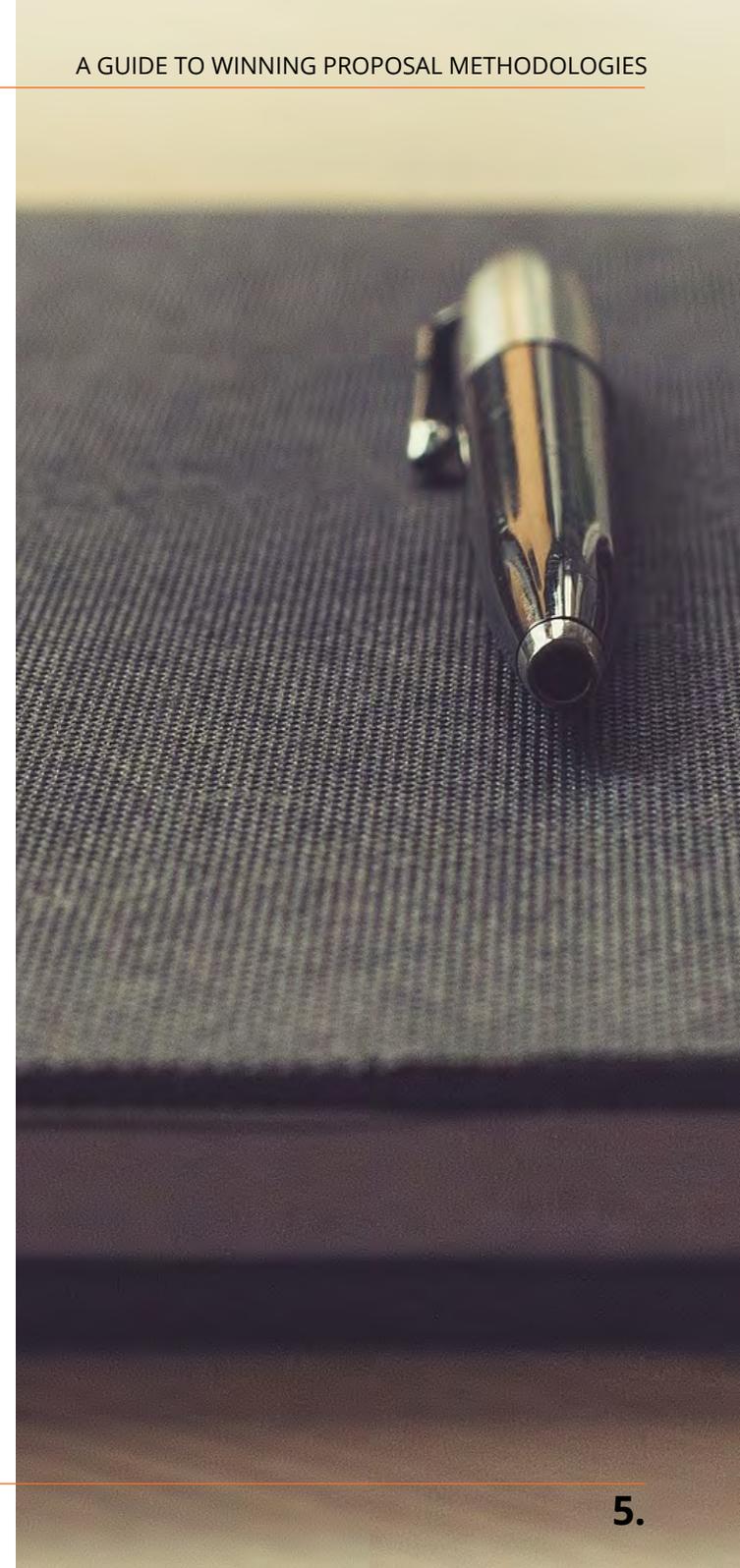
Functionality such as in-document co-authoring helps reduce version-control issues and speed things up even further. And if the solution integrates with your CRM system, it can be used to automatically pull company and pricing information into the document, reducing the risk of errors.

5. Write the proposal.

If you employ a copywriter or a dedicated proposal writer, now's the time to brief them. Share your win strategy and proposal themes with them if they weren't involved in the brainstorming phase, and hand over the 'rough' version of your document, containing the responses from your SMEs.

It's important at this stage to make sure that your writer is clear on the style and tone of voice that you are looking for. Our experience is that clear, simple language and short, concise paragraphs are vital. If you don't need to submit your response in a pre-designed template or via an online portal, then you should also brief your design team so that they can incorporate any relevant themes or ideas into the layout of the proposal.

If you have a proposal management system that offers smart templates, then you can simply select the template that is most relevant.



6. Share the document with others.

When the proposal has been written, it's a good idea to get input from others for the second time. Shipley recommends sharing the proposal (and brief) with a group of people made up of some of the people who made up your 'pink team' and reviewed your win strategy, and people who have not been involved in the process yet but who have relevant experience or insight and can provide a fresh pair of eyes. This is your 'red team'.

If you have followed the process correctly, you shouldn't have any big changes to make at this stage.

7. Finalize it and send it off.

Once your writer has incorporated any final changes, and the document has been proof read one last time, you're ready to send it to your prospect.



THE BASIC PROPOSAL PROCESS

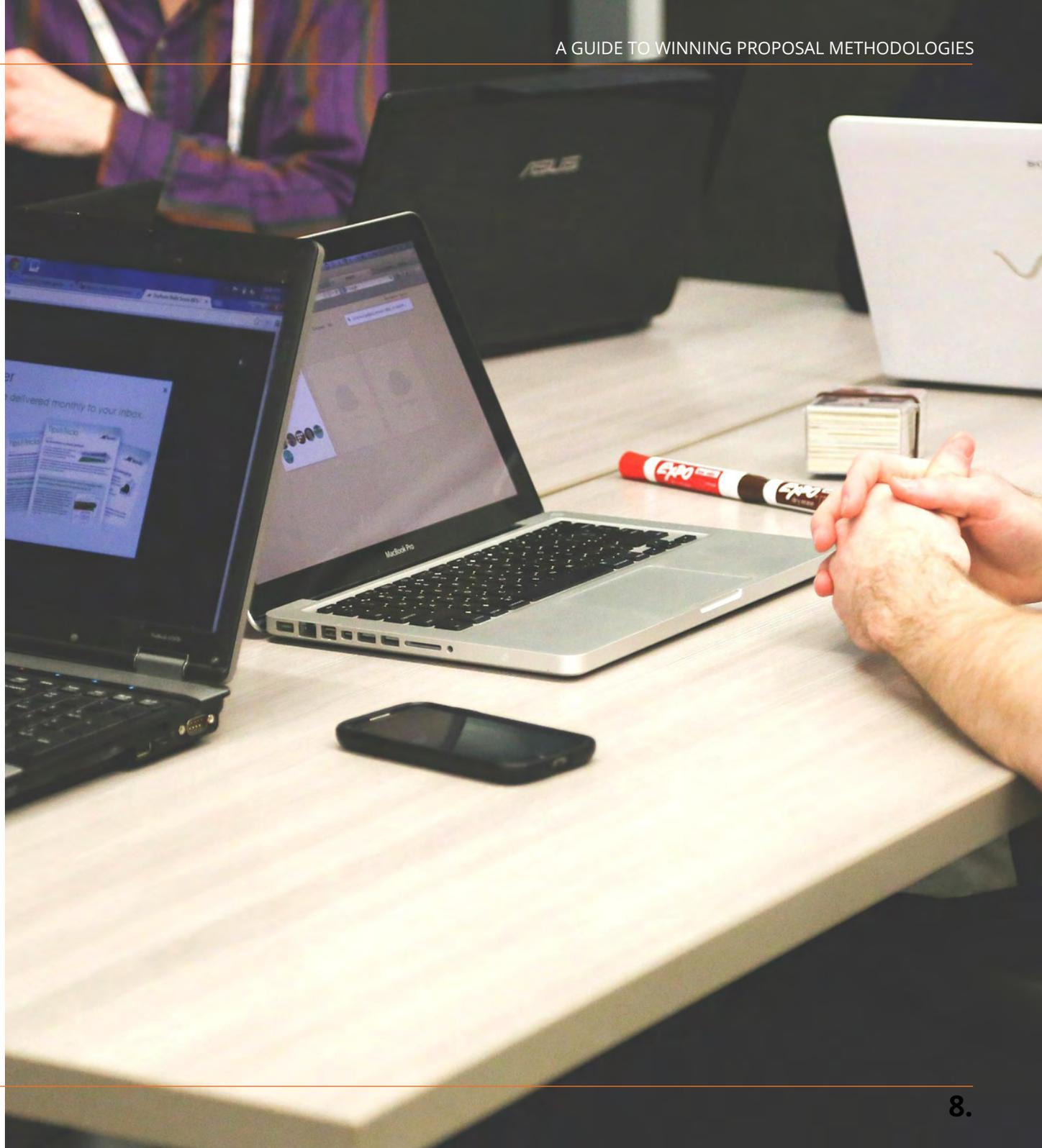


CHAPTER 3

HOW TO MAKE SURE YOUR PROPOSAL PROCESS WILL BE FOLLOWED

A conversation about processes may cause some people to break out into a cold sweat – and often for good reason. When you enforce a process, it's important to make sure that it is easy to follow. Ideally, easier to follow than doing things their own way.

Here are a few helpful tips that will help you create a smooth, timely, and transparent proposal process:



KISS (KEEP IT SIMPLE, STUPID)

The most important thing to remember when developing a process is to keep it simple. The benefits of following the process should be clear. The process should be well-defined so that it doesn't confuse people or make them do things that aren't necessary.

Reinforcing your proposal process can be done through templates that offer helpful prompts and guidance at each stage of the process.

KEEP RE-USABLE PROPOSAL AND RFP CONTENT IN SHAPE

You'd be amazed at the difference a well-planned, regularly-updated content library can make. When everyone in the business is working from a central database, and when they can all be sure that each piece of content is correct and up to date, then you have a good foundation for streamlining not only your proposal process, but the entire business development process.



TRAINING IS VITAL

Even the best laid plans can fail. You can develop the greatest proposal process in history, but if you don't have people with the skills required to execute the plan, then you're likely to be disappointed in the end result.

Nothing beats experience, but we recommend investigating the proposal management courses run by the APMP. There are also a number of conferences, events and workshops that are great for keeping up to date with the latest best practices and trends. You could also hire a consultant to work with your team for a couple of months. Or, to cultivate an environment of constant learning, consider implementing periodic knowledge-share sessions, during which team members with particular skills or experiences can share tips and advice with the wider team.

As your company grows and your team gets bigger, consider giving experienced members responsibility for training up new members on the proposal process you have implemented. This will not only lessen your responsibilities in order for you to focus on more pressing matters, it will also reinforce your team and develop their initiative and leadership skills.

NEVER STOP IMPROVING

Constantly review and revise your process and templates so that you and your team are always on top of your game.

By following these simple tips, your company will be putting its best foot forward and creating high quality proposals that consistently win new business.



CHAPTER 4

THE ROLE OF PROPOSAL MANAGEMENT TECHNOLOGY IN STREAMLINING THE PROCESS

Business process automation (BPA) has already revolutionized many internal processes across all departments, and the bid / business development department is no exception.



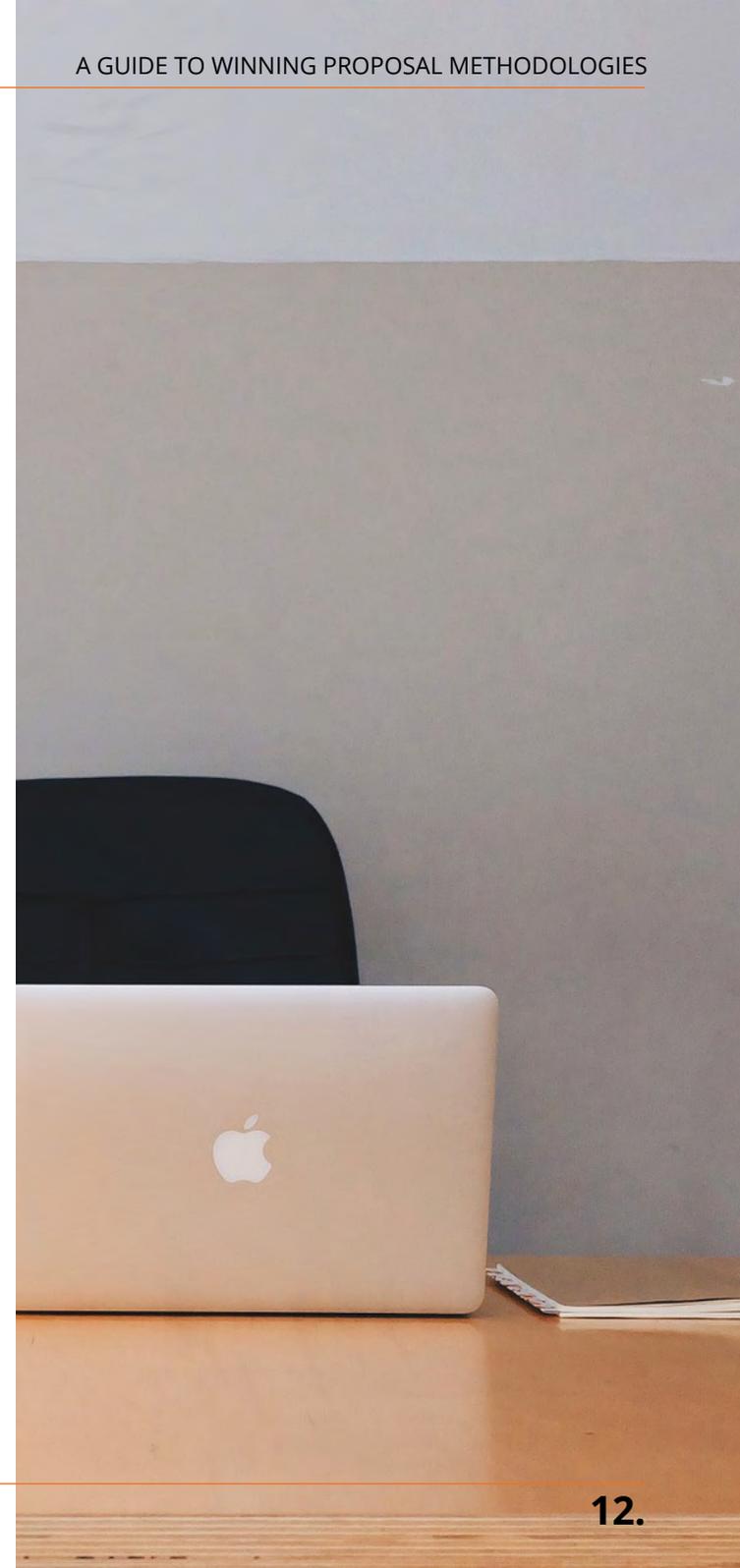
Proposal management technology helps to enforce correct processes and makes managing projects much simpler, by automating the following parts of the process:

Content / question allocation – simply highlight the question and allocate it to a subject matter expert for completion. The system automatically emails the contributor and reminds them of the approaching deadline.

Adding the answers to the proposal / response document – some proposal management solutions, like Qorus Breeze Proposal, offer co-authoring functionality. This means that multiple contributors can work in the same document at the same time.

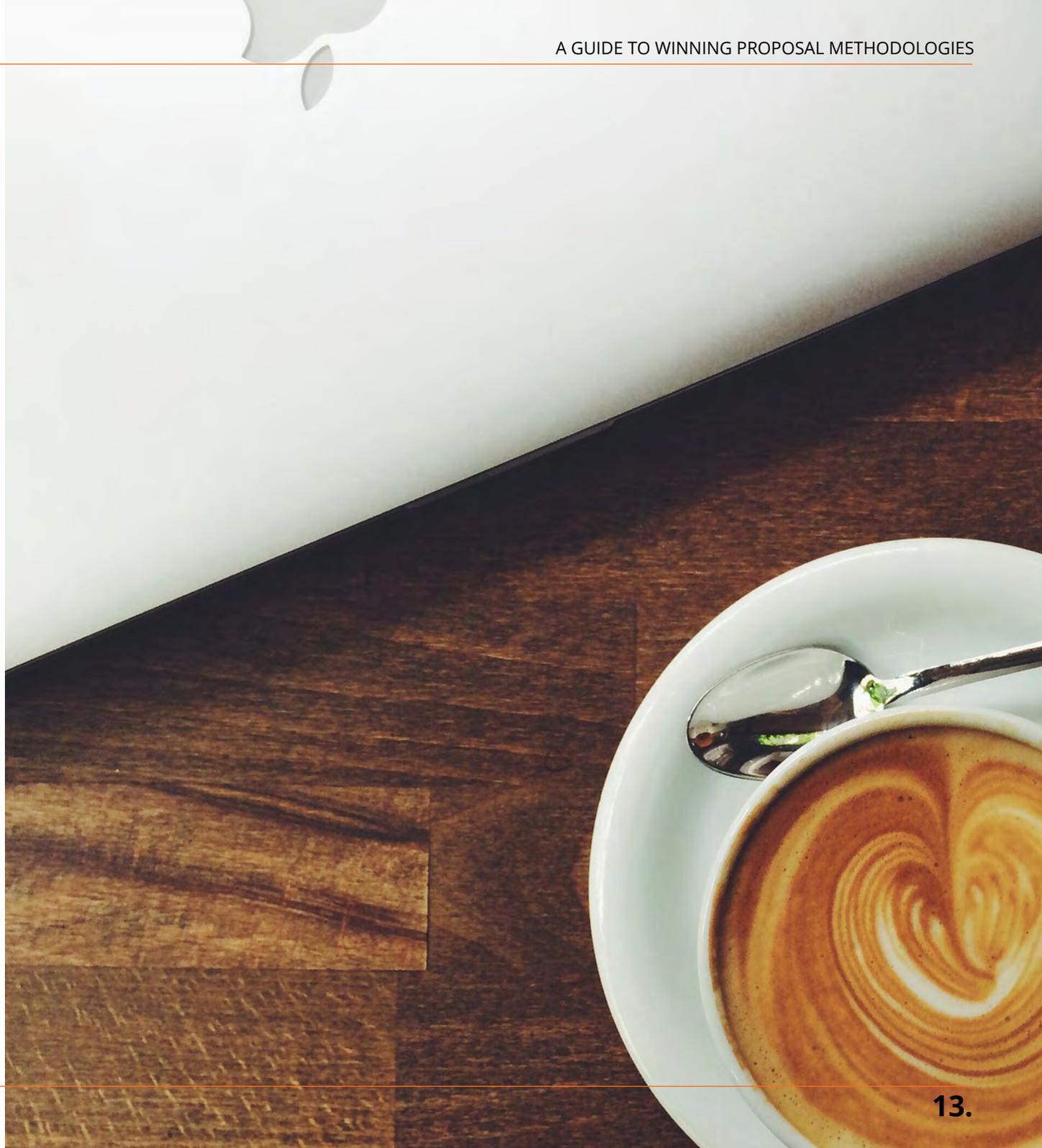
Generating tailored presentations, proposals and sales documents – automating the process of putting relevant content sections into a pre-designed template, and merging that content with CRM and other project-specific data, means that even the newest sales, marketing or bid team members can generate high-quality documents and presentations in a matter of minutes.

Maintenance of sales, marketing and proposal content – the ability to assign a document owner and subject matter expert to each piece of content in your knowledge library, and to assign regular review reminders, simplifies the job of maintaining content.



In our recent [survey into the state of proposal management](#) around the world, some light was shed on the value that proposal software adds to a company's business development efforts. The majority of respondents who use this type of software stated that it was vital to their organization and that it gave them a strong competitive advantage.

[Here's a case study](#) that details how proposal management software helped Long View Systems.



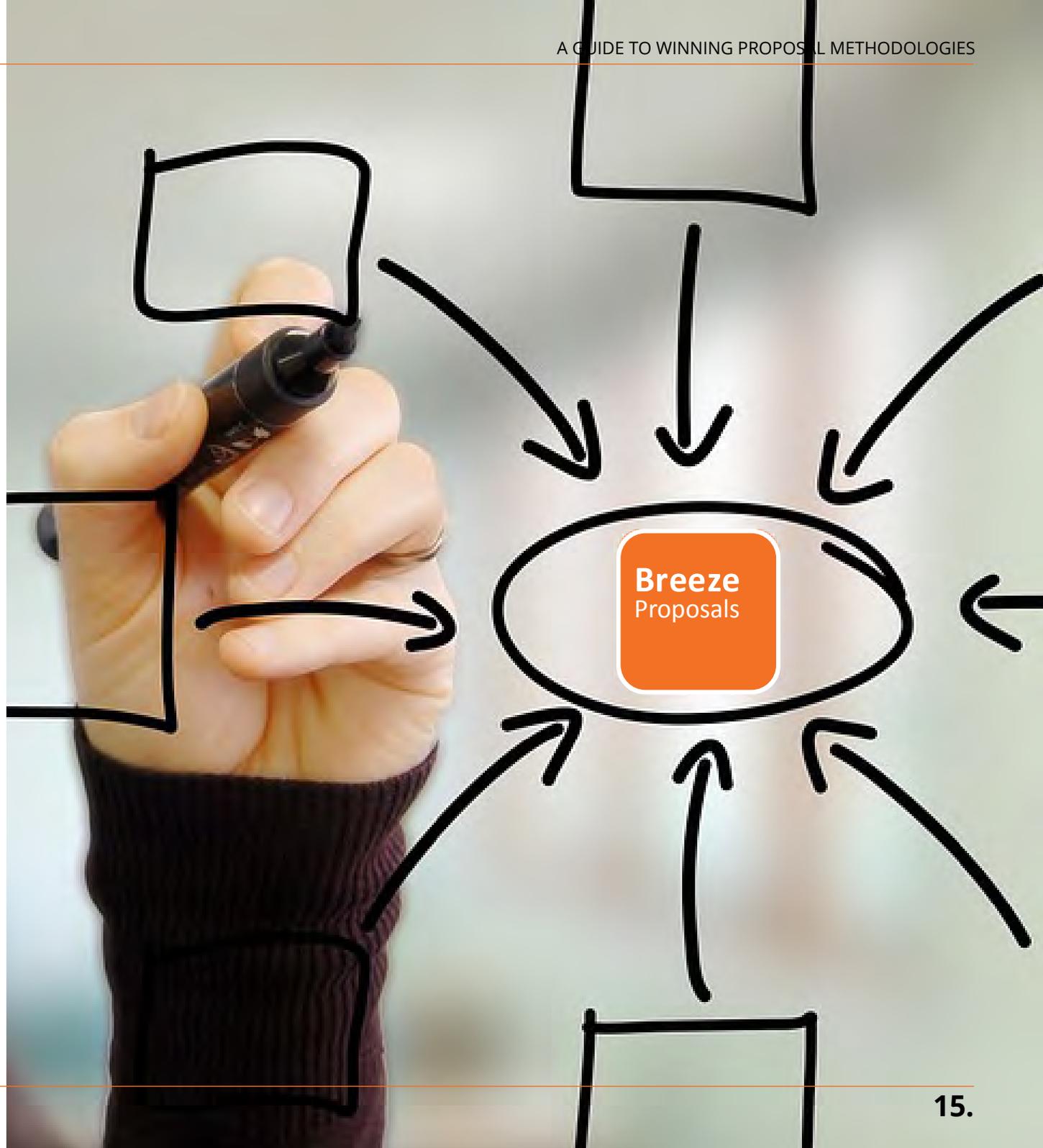
Technology is only as effective as the people who use it

Proposal management software, like any technology, is really only ever going to be effective if it is implemented and used properly. Following the correct process and hiring or training the right people is key to improving your proposal win rate – automating certain elements simply accelerates the process, helping your team to respond to a greater number of RFPs, faster.

If you're unsure about how this type of solution can help your business, *[download our proposal management software decision making guide.](#)*

CHAPTER 5

INTRODUCING QORUS BREEZE PROPOSALS



Among the software solutions on the market today for pitch, proposal and RFP management is Qorus Breeze Proposals. Available as both a hosted and an on-premises solution, it's one of the most popular and easy to use, with widespread take-up in the legal and other sectors.

The solution aims to reduce training time, speed up implementation, and encourage company-wide user adoption, for the benefit of Marketing and Business Development as well as Bid and Sales teams. To achieve these aims, it's built on familiar **Microsoft Office** tools: Word, Excel, and PowerPoint; and is fully embedded into SharePoint, to help you maximize the value of your existing technology investment.

Qorus Breeze Proposals incorporates all the functionality you'd expect to find in a proposal management solution to help you create beautifully branded and consistent documents every time. Functionality includes:

①

A content library with **Google** like search capability.

②

Easy co-authoring and collaboration.

③

Guided carts for highly automated proposal production.

④

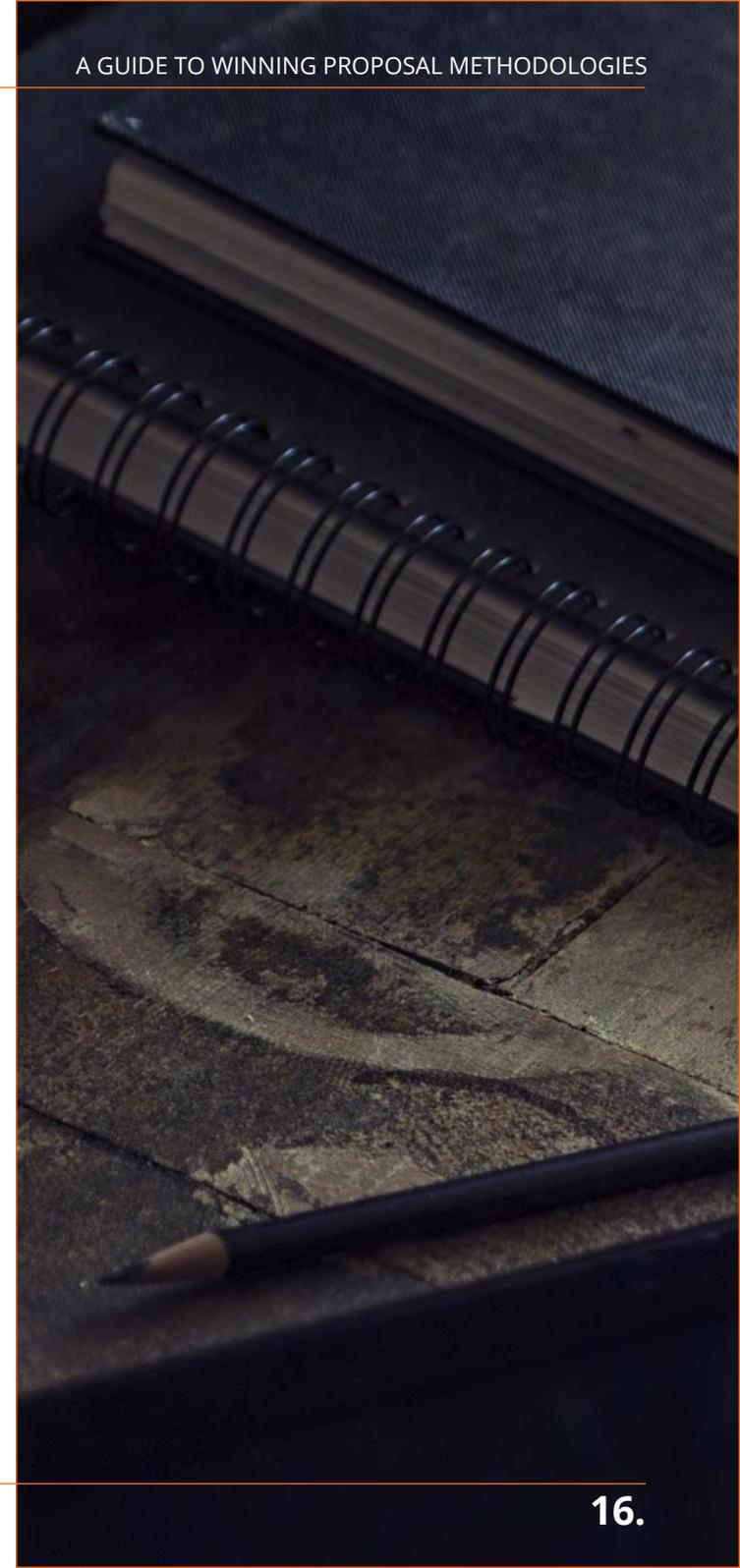
Tight integration with CRM and other enterprise systems.

⑤

Automated allocation and approval workflows.

⑥

Project dashboards and reporting.



ABOUT QORUS SOFTWARE

Qorus Software is a leading global pitch and proposal and document management solution provider. Core to our success is the conviction that software should be intuitive and easy-to-use. This is why our solutions are built using well-known Microsoft applications like Word, PowerPoint, and SharePoint.

Qorus has a growing list of global enterprise customers and we believe that, together with the right processes and people, software can help accelerate the sales cycle. We are headquartered in Seattle, with offices in the UK and South Africa.

Download our [Report on the State of Proposal Management](#), to learn more about how businesses worldwide are managing the proposal management process.



CONTACT US

Learn more about us by visiting [Qorus Software](#), or [contact us](#).



To request a demo of our proposal management software, visit [Qorus](#).