

BQ

BID UTOPIA

A VISION OF AN
EXTRAORDINARY FUTURE

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INTRODUCTION BY MARTIN SMITH

Utopia can be interpreted in many different ways. A utopian 'bid society' might be one where everyone is happy and its systems and processes run perfectly to deliver the perfect solution.

It's not surprising how ubiquitous win-rate is when I raise the subject of bid utopia with my colleagues. To many people, bid utopia conjures up images of a 100% win-rate. But what does utopia mean to you? Do you imagine a world where you win every deal? Or perhaps a world where completing bids becomes as effortless as swiping an app on your phone? Maybe you simply wish to leave work on time and spend more time with family? The concept of utopia is largely subjective and will mean different things to different people. Within bids, the perfect world may seem somewhat unachievable, or at best aspirational in the context of the extreme time pressures and often scarce resource.

However, being an optimist I was keen to consider the possibilities of utopia and see where some visionary thinking could take us on the journey towards this illusive place.

I'm delighted to say that our panel of experts have delivered up some fantastic ideas, concepts, and views on this somewhat intellectually challenging subject. We have nine different perspectives for you to peruse – some of our experts certainly share the same views, others are somewhat more 'out there'.

Whatever your view on bid utopia, the challenge is achieving the desired outcomes, or at least taking the first step on the journey. The more I grapple with the subject of bid utopia, the more I start to question whether it's really about the journey or the outcome. I'm not sure bid utopia lends itself to both. A 100% success rate and monopolistic approach certainly wouldn't satisfy the needs of all customers. Would a utopian bid society ultimately lead to commonality and conformity of offering? If so, where is the fun and innovation in that? The 'eureka moment' of discovering a new way to articulate value and differentiate from your competitors surely has a place within bid utopia?

In its very simplest terms, bid utopia to me is a place where we proactively learn from our mistakes and stop the cycle of repeating failure. Each lesson learnt forms an ever more focussed qualification process. It's a place where we set measurable and achievable goals and constantly aim to improve, never resting on our laurels.

My personal views are probably coloured by the challenges and difficulties I have faced over the years when running large bids. To really clear your head of this baggage is difficult when trying to imagine a world of perfect bidding.

I'm instantly drawn (and perhaps somewhat predictably) to the idea of synthetic humans or robots doing much of the 'grunt' work of bidding. With their ability to learn I could quickly see them managing content libraries and pre-populating documents for me. They could be tasked with continuously scouring big data to uncover the latest competitive intelligence. Frustratingly, I still find today that nearly all competitive intelligence is anecdotal and very rarely based on facts and genuine research.

Personally, I believe the biggest hurdle to attaining a utopian bid state is the ability to shift the entire process from reactive to proactive. This in itself is reliant upon procurement also recognising the need for change but as our procurement expert Beth Wallace explains, there is an appetite for change from within their ranks.

I am a firm believer that the current process of issuing RFPs and scoring responses is fundamentally flawed. Whilst I understand the logic behind it, very rarely (in my opinion) does it create a level playing field or allow buying organisations to compare apples with apples. Whilst this situation allows some bidders to gain a competitive advantage, I'd argue it doesn't always provide customers with the best solution. You only have to consider how often public sector procurements go massively over budget.

I'd prefer to flip the process on its head and rather than have procurement teams pose hundreds of questions, they are able to satisfy their main information needs (80:20 rule) from some form of standard system that all bidders subscribe to and update information proactively.

Rather than responding to endless RFPs, this would allow sales people to focus on selling and articulating a solution and encourage more collaboration with marketing. It would also allow bid teams to proactively produce and maintain the best possible information and content from which potential customers could shortlist potential suppliers. This for me would be one small step closer to bid utopia and ensure customers really get the best solution and real value for money.

I really hope you enjoy this issue of Bidding Quarterly and encourage you to share your ideas and challenge our experts at bidsolutions.co.uk.

INTRO- DUCTION



NIGEL HUDSON

Bid & proposal professionals are, by definition, professional. It's in our DNA. We're committed to getting the job done, working late to meet deadlines and doing whatever's needed to please the evaluators. We want to succeed, and we like to win. This in itself is praiseworthy and extraordinary compared to other professions – like auditing – that play it safe and lack the obsessive restlessness needed to continually innovate and improve.

It could be argued, therefore, that our profession is already extraordinary. Our benchmark is high. We go the extra mile. How is it, then, that we know we can always be better, quicker, have more energy, and win more? Truth is that most of the time we're not extraordinary. We're just busy being busy – for others. Hiding in our silos, playing safe, doing what's expected of us, following the process and cranking the handle. Like balls in a pinball machine, we whizz around from pillar to post at incredible speed until we realise that we're not in control of our destiny. We then either brace ourselves for a bumpy ride, or fall through a hole at the bottom.

To be genuinely extraordinary, we need to take control: turning things around by not being busy for a while. We need to step out of the day job – to rest, do some training, and reflect on how to do things better. We then need to take action, doing the things we know are important at a pace that keeps us ahead of our competition. It's like the old proverb of the carpenter who, exhausted by 24/7 sawing with a blunt saw, simply doesn't have time to stop and sharpen the saw. 'Too busy sawing' he says.

My hunch is that we're too busy striving for excellence to actually be extraordinary. For consider: when did you last take a look around to see how your behaviour, win rate, proposal output, tools, resources, qualification and experience compare to others within and outside your industry? If it was more than six months ago it's

too long and you've become complacent. You might not even have the network of bid & proposal peers to ask the questions. And, even if you find the information you seek, do you have a trusted mentor or independent auditor who can benchmark your ability? If not, how will you know what extraordinary looks like?

To be in the top quartile, you have to know what the top quartile is doing. To be better than them, and be genuinely extraordinary, you have to be doing things they're not. You have to innovate, be hungry for change, continually learn, have the time and budget to make it happen, know where and how to deliver value, understand the 'why' of your existence, want success more than everyone else, have a high-flying team around you, and do things differently and better than your peers – things that our profession has never seen or done before.

That's a big ask, not least because we're don't always know what's been done before. Fortunately we have the APMP to keep us abreast of latest good practice. But 'good' isn't enough when we're talking about extraordinary. We want to be the best. We want our win rate and capture rates to be above 90%. We want to be working on 20 bids at a time without breaking a sweat, because our tools and systems do the heavy lifting for us. We want to be so good that the competition decline to bid, or withdraw their job application, as soon as they know we're at the table. We want to be truly extraordinary.

We're not there yet. In fact we'll never be there. And that's the point. Because extraordinary people constantly push the boundaries of the possible. They're the trailblazers that light the path for others. Wouldn't it be great if one such person made it to the top of their business – a FTSE 100 CEO with a foundation and background in bidding. Now that really would be extraordinary.





You've been on the courses. You've attended the conferences, popped up at the chapter meetings. Your well-thumbed copy of 'Proposal Essentials' sits alongside the APMP Study Guide. You check Twitter every morning: LinkedIn groups every week. The certificate on your wall shows that you've attained at least the Foundation level qualification.

Ours is a profession that's matured. Where proposal centres were a back-office factory, they're now recognised as a source of competitive advantage. (Usually). Where proposals looked awful, they now look impressive. (Often). Where salespeople looked down on their bid and proposal colleagues, they now treat us as equals. (Sometimes).

Even as I write, I find myself qualifying my own statements. Has every company's proposal operation even reached that first base, never mind positioned itself to move forwards to new heights? Sadly, I doubt it. Too many of us are still fighting age-old battles for resource, budget, attention. Proposal management's not yet in the DNA of every company, by a long stretch. It's still far from the case that - to quote BJ Lownie, who founded Strategic Proposals thirty years ago - all those involved in proposal development have been trained in the necessary skills.

But, increasingly, we find ourselves working with teams who are doing amazing stuff. Whose senior management truly get it when it comes to winning work. Whose sales teams view proposals not as an inconvenience, but as an opportunity. And whose leaders are now looking for further ways to create differentiation and to win more business.

And so I'd point to four main directions of travel for the most successful proposal teams.

First, we see sales teams who genuinely appreciate the power of strong pre-proposal planning. If the first you hear of an opportunity is a week or two before an RFP lands - or once it's come crashing in - you'll have missed so many chances to build momentum behind your bid. Someone else, not you, will be on the inside track. We've talked about it for years: we're now seeing it happen more widely than ever before.

Second is the move to a renewal culture. Sure, it's more glamorous to win new business. When do people in your company get more excited - bringing in a new client, or retaining an existing one? Yet I'd argue that protecting the jobs of colleagues delivering current services is just as important, if not more so, than capturing new deals.

So we've increasingly found ourselves helping teams to build their processes (and skills and capacity) for renewal proposals. Why wait for a competitive RFP, if you can circumvent that - or at least wire it heavily in your favour? (And note that I'm not talking about 're-bidding'. If you end up in a 'rebid' when you're incumbent, you're already on a slippery slope you want to avoid).

Third, throughout the process: understanding the role of bid competitive intelligence, and establishing processes for capturing and managing it. You don't have to bid blindfolded every time, or rely on the salesperson's often ill-informed gut feel to determine "why us, why not them?" You can research, capture and share information in a way that changes the game - with the right resource and mindset to drive the process.

Finally: the far greater role of the proposal team in the pitch. We've seen for too long the utter nonsense of the presentation being developed by a different team of specialists to the one that helped with the proposal - when the skills of storytelling, creating buyer empathy and top-notch design are fundamentally the same. The best proposal teams support the proposal and stay engaged until their colleagues have delivered a killer, mike-dropping pitch.

Wherever you are on the journey - still struggling in the valley, passing base camp, or climbing to the heights - I know that this profession is full of wonderfully, creative, committed individuals. We do great work, often against the odds. But when we start to stack those odds in our favour, great things happen.



Peter McPartland, Bid Manager of national law firm Weightmans LLP, promotes the importance of constantly striving to create the ideal culture and environment for bid teams to flourish.

Bid teams bring together individuals with varying expertise, ability, knowledge, imagination and motivation. Our leadership must create the model conditions where everyone involved can do their most productive, courageous and inspired thinking – together as a team.

The potential impact of marginal gains with each person is huge when aggregated. On a recent major tender, over 60 people were thanked following its submission for their investment and leaving what I referred to as their fingerprints on a very special bid.

For me, people are at the heart of successful bidding. However, for many, the field of bidding is outside their natural area of expertise. Realising the potential that exists within each of these individuals to contribute ideas and stimulate the thinking of others represents a massive opportunity. However, the pressures involved in tendering mean we can run a real risk of neglecting to personalise support to individuals and allowing group dynamics to creep in, which foster behaviour that discourages collaboration.

The belief that great ideas are produced through an individual's flash of genius is a myth. The process of anything innovative must be collaborative. Originality arises from the interplay of ideas and positive abrasion that occurs during the interactions of people confident to offer their own points of view.

At the formative stages, when you are developing win strategies, exploring different ideas or encouraging imagination, it is easy to forget that the harnessing of collective talent can feel demoralising for those involved. That is because the best ideas invariably evolve through discussions where people are exposed to what can feel like conflict and rejection. Giving people confidence to contribute ideas is vital.

Trust underpins positive conflict, but without engendering genuine trust, the conflict you experience can feel anything but positive.

Bringing diverse groups together, either from different teams, or made up of people at different levels can generate rivalry.

It is vital that we, as bid coaches, never lose sight of the importance of creating an environment where people know from the outset they have the freedom to share opinions, irrespective of their perceived comfort zone or the status of others in attendance.

OUR LEADERSHIP MUST CREATE THE MODEL CONDITIONS WHERE EVERYONE INVOLVED CAN DO THEIR MOST PRODUCTIVE, COURAGEOUS AND INSPIRED THINKING –



STRIVING FOR UTOPIA

To reach such utopia above it is important to perform honest assessments of what inhibits you in relation to your organisation's approach, attitude and aptitude for bidding.

For example:

- **Relationships:** Are people with client contacts or those who have been engaging with potential evaluators confidently extending your network of relationships?
- **Competitiveness:** Is the bid team genuinely aware of others you are competing with, their strengths / weaknesses or the likely win strategies they will adopt?
- **Focus:** How early on in the pre-bid process are bid teams created and how positive are people about their involvement?
- **Confidence:** What depth of bidding experience do those involved have?
- **Teamwork:** To what extent are internal politics influencing how people behave?
- **Imagination:** How comfortable are people when asked to think imaginatively about ideas that can make a difference to client experience?
- **Conviction:** Is there a lack of persuasion and energy in people's bid writing? Similarly, when preparing for face-to-face pitches, is there a lack of potency or genuine cohesion from your pitch teams?
- **Accountability:** How much reliance is placed upon the supporting bid specialists to develop the bid rather than offer guidance or challenge the thinking of those involved to execute the win strategy?
- **Responsiveness:** Are people adhering to commitments, particularly tasks that others are dependent upon to start theirs?
- **Stimulus:** How well does the business capture or share impressive evidence or information to consider emphasising?
- **Learning:** Is the feedback loop, both internal and external, carried out objectively, and is there an appetite to progress through action plans that drive continuous improvement?

The outcome of such assessments presents opportunities to evolve quicker towards the idealistic.

Commitment to such utopia will serve to generate the enriched experiences and productive environments which stimulate enhanced performance - of all involved.



Pippa Birch

As a freelance bid writer, I don't often feel that I am doing anything extraordinary, however this question got me thinking. I provide a great service which ensures my clients return to me time and again, but am I really doing anything over and above what's expected?

Last year I was contracted early in anticipation of bid documents coming out in September. Yep, you heard me right – they wanted to ensure I was with them when the document landed. As often happens with my clients, I have to say “No” quite a lot as I am only one person, and they didn't want to run the risk of me working for anyone else when they needed me. This bid was business critical – it was crucial for them to be able to become part of a framework community on the Highways England network, to have a seat at that table and be part of ongoing discussions. They recognised they couldn't do it alone.

So how was I to spend this extra time? I decided to complete a gap analysis of current bidding practices within the company, consequently making suggestions of how they could be more efficient and focus on winning the right work for their future business plans. I really had the chance to create a 'Bid Utopia' - an imagined place or state of things in which everything is perfect. I had the chance to articulate what it means to be extraordinary in the bidding world, albeit at a basic level for this small civil engineering company. So I set about writing a Bid Management System....



I always tell my daughter that nothing is impossible – if you want something, go out and grab it with both hands. To be extraordinary, one has to break down barriers and grab all that life throws at you with both hands. However, I do understand, as with life, there are barriers to being extraordinary within the bidding world (or so we are conditioned to think): too much to do, too little time, lack of understanding from others, lack of confidence in ourselves, not enough money, little direction, no chance for change and so on.

Specific weaknesses in my client's bidding practices could be summed up as lack of experience, procedure and direction. As a new and rapidly expanding team, there had been no time until that point to take stock of the strengths and weaknesses in knowledge and experience. Staff knew how they wanted to do things, but it resulted in everyone doing something their own way, some of which was sheer brilliance, but without organisation it wasn't extraordinary, it was counterproductive. The whole team ended up being reactive rather than proactive, which I have seen time and time again in companies of this size.

I decided to write a management system with no barriers – no time constraints, no budget restraints. This was an opportunity to present a comprehensive understanding of what it takes to win a bid in an ideal world. This was exciting stuff!

Bid Utopia could be summed up as a place where the bid pipeline is clear (no scattergun approach!), the process is robust, staff are well-trained and empowered to make positive changes, and every critical bid is won.

Utopia is also known as 'seventh heaven' so here are seven steps to my Bid Utopia:

- 1. Implement a robust end-to-end bid management process**
- 2. Plan your bid pipeline – focus time and resources on business-critical contracts**
- 3. Train your bid team and the wider company to ensure understanding of what it takes to win**
- 4. Allow for a realistic budget for an exceptional team on every bid**
- 5. Set aside time for regular review and learning to ensure continual improvement**
- 6. Inspire and motivate your team to be extraordinary**
- 7. Constantly question processes and suggest improvements – then make them happen.**

The good news received at the end of this little story? My client were awarded a spot on the framework and continue to win work, using my management system and building on what I taught them. And to top it off, I have another client interested in my system. To me, that really is extraordinary!



BETH WALLACE

Wouldn't it be lovely if we got to a situation where full on formal bids were a thing of the past – or at least the relationship with the client (appreciating this wouldn't work for new ones) would be such that they don't want to go to market? It is something that has recently been discussed between law firms and procurement people as part of the coming together of minds in the Buying Legal Council forum. Whilst being advocated strongly by lawyers, it didn't get as much resistance as people thought from procurement colleagues. Whilst there is definitely a keenness on both sides to consider how it could be done, it may not happen for some time.

Extraordinary from a procurement perspective is having that in-depth working relationship with the supplier that means we are each involved so heavily in each other's business, it creates a more trusting and open environment. Whilst some time ago, the best example I had of this was where the relationship sponsors shared objectives and one was agreed for each which pertained how to continue to build the relationship. Success – and failure – of the relationship was shared and, as a business partner, the level of interdependence was incredibly strong. Whilst some behaviour is driven if in a single source relationship, it doesn't always have to be the case. Sponsorship and ownership at the right

Having the right people in the room to ask and answer questions would be one step closer to utopia.

level for both customer and supplier is absolutely key to this, as is having all of the right level and frequency of governance. If the sourcing strategy is still to keep a level of commercial tension and formal bidding still required, at least it would be done from a position of strength of knowledge rather than assumptions.

Often procurement processes create barriers in themselves, as does not spending enough time before bids with the client/supplier to really get to know what they want and need. Building up knowledge on the market place, understanding suppliers and their offerings – and more importantly their business strategies too, especially for future business direction – is so important. Being open to ideas during the bid process would also work wonders, and being clear and specific in bids on both sides would remove barriers too. It would be wonderful if the process could run to tight but reasonable timescales – if it is needed at all – and recognition of the work that is needed to respond to the level of detail required, is given through the response times. Having the right people in the room to ask and answer questions – and having the team who will deliver what is being asked present to test compatibility and culture, would be one step closer to utopia.



The main discussion topic with my clients and those in the bidding world in general, is how to have, firstly, rapid and solid decision-making for bid decisions and, secondly, pricing strategies in markets that have become (or are rapidly becoming) commoditised. For the former it is whether to commit time, resource and effort for a particular pursuit (in place of another) and if it is to be pursued then what is the best approach when it comes to "make, team or buy". For the latter it is about how to win on price when:

- the technical offer is commoditised by what the client has specified (in detail, and without deviation) and;
- the performance criteria (e.g.: service level agreements and timeliness) have all been set.

Increasingly – thanks to the internet-of-things, the readiness of choice and the power & knowledge of the buyer's procurement teams – the concept of value-proposition and quality-differentiation seems to be eclipsed by price, this being the single most important factor. This means that for the seller (internally) the emphasis shifts to realising profit over the long term, rather than just signing-up revenue. This is especially true if revenue levels become insufficient to cover operational costs due to being set by the win-price so as to secure the work from a rival.

My emphasis over the last three years, and especially now, is on using the tools in place quickly and early-on (and sharing with key decision makers) to evaluate potential profit either to avoid nugatory effort or to bolster how to marry winning against the competition whilst making a 'satisfactory' profit. The desire to do this is growing as more companies find themselves in commoditised markets where clients see their products as the same as other companies even when they're not.

In this context – what is bid utopia? And what are the barriers to being extraordinary, as individuals and as a team?

In a word: collaboration...or lack thereof. This is the largest barrier to being extraordinary and having a joined-up approach to bid/no bid, winning against the competition, and delivering to a profit (albeit more modest than may be preferable, or mandated by a Finance department). By collaboration I mean having an open, honest, and moveable position between Sales, Operations, Finance, Bid teams and Governance. This also involves sharing information and knowledge (and being honest where knowledge is lacking) as soon as possible. Indeed, declaring that something is not known for a team to work on together to then 'know' is far more constructive than an ongoing pretence.

Sales are motivated by revenue as without that there is no money to be made – and it is the proxy for success or failure: 'revenue comes in = success' is the simple algorithm. A further argument is that it is the salesperson's job to sell and generate income, and for operations to keep costs beneath the sell price to result in a profit margin. I do not subscribe to that 'us' and 'them' ethos as the price is the key to balancing a win with generating sufficient revenue to cover costs. If the price is wrong (e.g. too low so as to win the work versus a competitor) then operations may never be able to keep costs low enough to generate a profit.

Operations are motivated by quality and standards. Meeting required levels (for internal purposes or those of the client and their contract) is never cheap, and is notoriously hard to predict and cost-in to a price at the bid phase. Of course, this is what risk management is in place to address, and the 'art' of estimating.

Finance are motivated by profit. It doesn't really matter if it is operating, net, gross, and any other accounting terms you may like to use...it matters simply that the costs are lower than the revenues, the bigger the difference the better.

Bid teams are motivated by getting the best and competitive answer out of the door, in the time allotted. Compliancy being key. Sitting in the middle of the win

COLLABORATION REPRESENTS UTOPIA: AN OPEN AND EARLY DIALOGUE, CONSTRUCTIVE DEBATE AND CHALLENGE AND RESPECT FOR EACH OTHER'S VIEWPOINTS

(Sales) vs delivering (Operations) vs making money (Finance) 'triangle', bid teams seek to balance, conclude and submit...and win.

Governance is one step removed and generally has the power to change the structure of the bid later on in the bid cycle. Pre-ordained rules of cost targets, required margins (profit), product strategies, etc. would be on the agenda. Of course, Governance sits in a wider context and needs to dictate what is and what is not acceptable for a bid, most notably price levels vs predicted costs and the resultant profit. Of course, if the profit needs to go up – who should yield: should costs come down even if they're already minimised, or should price go up but be above the competition?

And so this is where collaboration represents Utopia: an open and early dialogue, constructive debate and challenge, respect for each other's viewpoints and, ultimately, consensus on the end results that feature in the price submission.

SO, WHAT DOES AN EXTRAORDINARY FUTURE LOOK LIKE?

For me this would be a universal ethos whereby those undertaking the roles of Sales, Operations, Finance, Bidding, sign-off/Governance and Pricing all have an equal standing and mutual respect – and each has the ability to influence all others to get to a common ground. Utopia for me is where the agendas and needs of bidding, delivering, selling and making money all align, with understanding and respect. The great news is that it does exist out there across industry, just not everywhere and not all the time.





PREPARING FOR THE AFTERMATH

Your “must win” bid is submitted on time. It has been branded a success at your independent Final Document Review. You have sent the team home for a well-earned rest and cleared the remnants of stale pizza and cold coffee from your war room. You can take the next day or so to relax a bit, prepare for the next one, and you can let the bid team return to their day jobs. Phew!

You are in your office chatting with the Operations Director about another opportunity when one of the sales team puts their head around the door, “I have had a couple of clarification questions from the client. Shall I send them to you?” When they arrive in your inbox, you and the Operations Director have a quick look.

The questions seem fairly straightforward and together, you pop a few words in an email and send it off to the client. “Now, what was it that we were chatting about before?”

Then later, you hear you have lost the bid!

Why does this happen? Well, one reason may be that you did not see the clarification request for the opportunity it presented. You treated it with less care and attention than the other text in your bid. But in fact, it turned out that this was the most important text of the bid! Another reason could be that you thought it was all done and dusted when the bid had been put in and you no longer needed the full team to support you. It was not!

We have put together a few pointers about how the savvy bid leader can achieve bid utopia in a Public Sector bidding environment and not fall foul of such traps as these.



SUCCESS

CLARIFICATION QUESTIONS ARE CLEAR SIGNPOSTS FROM THE CLIENT

DEALING WITH CLARIFICATIONS

When a Public Sector client asks a clarification question it means that it cannot decide what your evaluation score under that question should be. It signifies that from your entire bid, these are the areas that could still make a difference. Your answer will be the decider. It may even affect the scores in other areas of your bid, as well!

Clarification questions are clear signposts from the client about those areas they are seeking to make choices in. They are also your opportunity for an additional communication with the evaluators, which may have a wider and major impact upon your bid win chances. So, your bid process needs to plan for these as opportunities to be exploited.

We believe that clarification questions should be treated with the utmost seriousness. Indeed, we have seen two clients lose their bid as a result of a lacklustre response when asked for more information like this. So, when a clarification question arrives we think you should reassemble the core bid team with some urgency. Then, as a team, you should examine the questions in detail, relate them to the specific wording in your bid and see if you can uncover the underlying reason why the question was asked in the manner it was put.

Next, you should test your response against any competitive intelligence you have. You must “Ghost” what you think your competition may be promoting in your answer, to tilt the balance in your favour. Finally, for any complex or lengthy response, you should précis the response as a short executive summary and include this as a preamble to the answer. Make it easy for the evaluators to show their bosses that you should be awarded the maximum marks.

We do not believe any of this can be done most effectively by the Bid Manager and a salesperson alone. It needs the same attention as the original bid strategy planning. It should be a result of a brainstorm meeting with everyone involved in that area of the bid. Get them all back together and treat the exercise with the same attention as you gave the original bid planning decisions.



SETTING UP THE PRESENTATION

Worrying about the presentation whilst firefighting all the other aspects of getting your bid out on time is an unnecessary distraction, isn't it? So why not leave it to the sales team to do it, the day before the presentation takes place? This is what can happen all too often. However, we think that this lack of attention can seriously impact upon your chances of success.

Winning bidders plan the presentation with the entire bid team as part of the overall bid creation activity. By this method they can have a presentation which compliments the bid and doesn't just repeat it. It harmonises with the core bid concepts and supports the key discriminators.

Moreover, presentations are often scored. Even if they are not, the presentation will be used to justify the evaluators increasing or decreasing your scores in specific areas. Sometimes the client's team will give you some guidance on what they want you to cover. They are not doing this for the fun of it; they have specific issues with your scores in these areas and they are going to use the presentation to resolve them! In other words, a clarification opportunity.

To get the best results, you must plan the presentation key elements with the entire bid team as the bid is constructed and then get the bid leadership and senior management together once you have the client's presentation instructions. Oh, and don't just go through your bid response; they will have read it. Think about what you can express in a presentation that you can't easily express in a document and weave that in. For example, empathy with the client situation, exuding confidence in delivery, being good people to work with. And, certainly, do not have a section titled "About Us" or similar. They are not interested in the number of worldwide offices you have and you will only irritate them (unless, of course, they have specifically asked for this information).

Finally, the presentation is the very best chance you will get to Ghost the competition and their solutions. Build it in!

LEVERAGING THE SUCCESS

You have been told that you have won! Hooray! Let's send (leak) a press release out right now so they will not be able to change their minds. After all, the Alcatel period is a joke! If you do that then what happens next is probably not going to add to your joy!

If you want to seriously irritate Public-Sector authorities, then do something which will not only break their processes but embarrass them, to boot! On the other hand, having a press release which boosts their egos ready to go and then "slipping it in" to them for approval at the right time, may win a friend or two? Of course, you would only do this to get their feedback if you were fortunate enough to win, wouldn't you?

PREPARING THE GROUND FOR CHALLENGES

You want to give your bid the best chance of success? Then you must lay the preparations for a challenge right up front. It must be part of your strategy.

This is easiest to achieve when the instructions ask for "Innovation" or "Added Value". If it is not clear how innovation or added value will be measured and scored, you can define this in your response. Then, if you are not awarded maximum points for a response where you have described one or both, you will have good grounds to challenge the decision on the basis of a "manifest error".

You could, of course, legitimately ask the Authority to define their marking criteria for these ambiguous terms; but why telegraph your intentions to your competitors, before bid submission? This is a tricky area, but one full of promise if you start thinking about it at the very beginning.

NEGOTIATING WHEN IT IS ALL OVER!

Sometimes there is a small but significant contractual point which is a real issue for your team and which you have, reluctantly, decided to accept to get the contract. When the dust has settled and you are about to sign the contract, you could turn to your Public Sector opposite number and say, "We have been relooking at the insurance level for XXX and we think it is unaffordable so we need to reduce it to £??? before I can sign! This is not going to be a problem, is it?"

Of course, if this is a material change and you stand your ground, the entire competition will have to be re-examined or even restarted. However, if it is not material, the Procurement team will have to balance the aggravation of sorting out their alternatives against accepting your bid with a "minor" and easy change? They may well concede rather than going through the whole procurement exercise again?

We call this "the Nibble" and it needs to be planned as part of the bid strategy. Will it work? Most often, yes. But it is not guaranteed and you need to be prepared to negotiate hard and then capitulate if it looks like you are going to lose.

BENEATH IT ALL

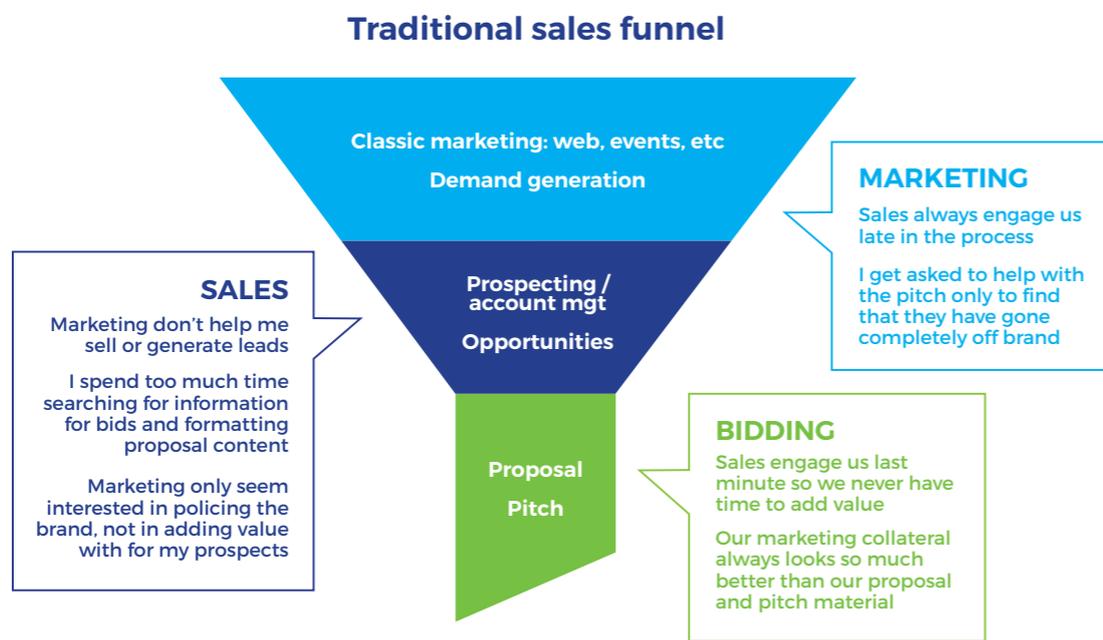
Underpinning all these pointers must be, of course, a sound bid with a compliant solution. However, these pointers are the bits that can turn a good win rate into an excellent one, a sound profit into something exceptional. It can take you to that goal we all seek – bid utopia!



Businesses are becoming more global. Technology is changing at an ever-increasing pace. Ways of working are evolving. Undoubtedly these advancements are going to impact not only bid and proposal teams, but also the sales, marketing and procurement teams that they interact with. Utopia will be making sure we are ready to exploit this. Let's look at what's (probably) to come...

CHANGES FOR SALES AND MARKETING

All too often sales, marketing and bid functions operate in isolation. This tends to drive the following challenges across the traditional sales funnel:



To avoid these challenges, sales, marketing and bid teams need to understand their roles in winning work and then work together in harmony to do so. The benefits of increased levels of integration are significant. According to a recent Forrester report, companies with aligned teams enjoyed a 38% higher win rate. Bringing sales and marketing closer together makes sense, but there's also another factor that's driving organisations to do this...

With nearly ubiquitous information, customers can do much research online. This means that they can go a lot further down the path to making a purchase before they engage with potential suppliers. The traditional sales funnel will be impacted as a result. Opportunities will not now drop in at the top, thanks to marketing efforts, then be processed and delivered by sales and the bid team. They will start to appear at different places in the funnel as the buyer takes more control over the process.

To counter this change, some organisations are driving a more targeted approach to sales and marketing. Advanced and often joint sales and marketing teams are focusing

on getting and then retaining **the right customers**, i.e. deciding which ones they want in the funnel, then pulling them in and controlling the process themselves. To hook new clients means spending more time on research then running targeted campaigns in to specific markets and identified clients. To do this efficiently, organisations need gather and process more information - an 'insights engine'. This will help capture and analyse data from various internal and external sources. The output will not only provide the ingredients for marketing and sales, it will influence organisational strategy and capability development. An example insights engine is shown below.



Adapted from the model from "The Workings of the Insights Engine" by Frank van den Driest, Keith Weed and Stan Sthanunathan

The problem with this model is the sheer depth of data that the insights engine needs to handle. The latest Artificial Intelligence (AI) tools can help do this. AI is being used today in companies like Udacity, where machines monitor thousands of interactions with customers and pick out what happened to get to a successful sale. Based on this data and in real-time, they advise company representatives on what to say to customers to improve their chances of making a sale. The impact: **sales effectiveness increased by 54% and Udacity can now serve twice as many customers at a time.** With use cases like this, we'll see more organisations investing in creating their own insights engines and starting to use AI to analyse, guide and even drive their sales and marketing functions.

In this new world, what sales and marketing functions need from their bid function is going to change dramatically. Here's another reason why...



THE WAY WE INTERACT WITH PROCUREMENT TEAMS WILL CHANGE

Formal procurement processes will of course still be required for bespoke and complex solution purchases. But these will happen quicker as buyers use technology to access and analyse potential suppliers automatically – qualifying them in or out without the need for interaction.

More transactional, less complex buying will occur via electronic marketplaces. Imagine being invited straight in to an e-auction with no prior engagement, as your web-based capability statements ticked all your customer's boxes. Imagine one step further when you receive an order because your (live) published price point also met the budgetary needs of your customer. Sounds a little far-fetched but we know from our latest 'Bidders view of procurement' research that the move to more e-procurement tools is rife across all market sectors. This is just the next step.

SO, WHAT IS THE IMPACT ON BID AND PROPOSAL TEAMS?

Bid and proposal teams need to be mindful that these changes will come and react accordingly.

New procurement processes mean that in the short-term someone will still need to own updating corporate data sets (which will just be shared differently). We're seeing this today in some of those multi-layer on-line

questionnaire tools that some organisations are using to qualify existing and potential suppliers. If the bid team is left doing this, in parallel to a reduced number of reactive RFP responses passing through the traditional sales funnel, then teams could be marginalised in to just a 'facts and figures' team.

To avoid this happening, bid and proposal teams need to also think about how they can become one of the inputs in to their organisation's insights engine. For example:

- Gathering intelligence on bidding results and reporting on any patterns
- Providing views on buying trends that the bid team are experiencing
- Capturing any changes in the requirements being sort by prospects
- Assembling insights on what clients are saying they need from existing account and sales teams

Bid teams are typically very close to all this information, so gathering it, reviewing and reporting on it should be possible. Also look at how this data could be stored within existing business tools so that it can be cost-effectively interrogated by others. For example:

- Enhancing the capacity of CRM tools
- Expanding the remit of the existing proposal knowledgebase
- Creating an Insights SharePoint site

As more scientific approaches are taken by procurement and sales and marketing functions, sales and marketing will need a different type of support on things like sales campaigns, targeted account marketing, renewal and proactive proposals. Proactive proposal teams are starting to recognise this and are starting to diversify their support in to these new areas, earlier in the sales process. For example, they are supporting proactive proposal and presentation development activity and are creating bespoke challenger-style insights papers to hook prospects. These activities use the same skills that bid teams should have today, but are just using them in a different way.

Understanding the changes that insights engines, AI and Machine Learning will have on organisations is key to the bid or proposal team becoming (or remaining) a strategic function within every organisation. Ensuring it feeds the insights engine and is supporting the new and more proactive behaviour of sales and marketing, will help you reach your own bidding utopia.

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 "Bidders view on procurement survey" by Strategic Proposals



Discovering bid utopia

THINK LOSING A BID IS BAD? WAIT UNTIL YOU HEAR WHAT HAPPENED TO ME

“Now I’ve met you, I wish I’d given you the contract.”

This is what I was told a few years ago by a CEO I bumped into at a social event. It was two years after I’d unsuccessfully bid into his multinational company in a deal that would have been the biggest of my career at the time.

And if you want to know what feels worse than losing a bid, trust me, hearing that is a whole new level of kick in the gut.

You see, in the space of a half hour face-to-face conversation, a connection had been made between the two of us. I’d listened to his story, he’d listened to mine. I’d asked questions and answered his. I’d taken the time to really understand the challenges he faced and offered solutions he hadn’t even considered.

I’m in my element in front of someone, enjoying open discussion, making things happen and bouncing off their energy. And the impression I had made in person was ten times more powerful than the impression I’d made on paper.

I’d lost a bid I should have won, and the worst thing was – I was mostly to blame.

You’ll find out why later but first let’s talk utopia.

MY (UNREACHABLE) UTOPIA

Although the current system has been designed to level the playing field, there’s an imbalance for those – like me – who are at their best in person, not on paper.

My bid utopia would see the procurement process run back to front, with clients and potential partners getting to know each other first and figuring out the formalities later.

In my opinion, the best business relationships are founded on friendship and mutual respect. And it only takes one meeting to get the most important things decided: Do we like each other? Do we trust each other? Do we understand each other? Will we work well together?

Details can be ironed out afterwards.

This is how business used to be done and it’s how I’d like business to be done again.

Sadly, in a procurement led environment, I don’t think that will happen.

The systems and processes are too firmly set in place, and it would be near impossible to have a meet and greet with every potential new business partner. But that doesn’t mean we can’t find creative and innovative ways to recreate the face-to-face experience without ever meeting or even talking directly.

In fact, that’s exactly what we should do – and it’s exactly how I spend my days helping businesses to win more bids.

It’s also exactly what I should have done, but didn’t, with the opportunity I told you about at the beginning of this article.

PART WAY TO PARADISE

So if the perfect scenario is chatting to a CEO in person, but you can’t do it, what’s the next best thing?

I don’t want to give all my secrets away but here are some tips:



- **Look past the initial questions and requirements to unearth what really underpins them**

There's always deeper meaning - concerns, challenges, opportunities and ambitions - you just have to dig to find them. And once you do, what you've learned about the client can be weaved compellingly through your entire campaign, just like it would your conversation. It will reinforce at every page turn why you're the best choice.

- **Make promises and commitments**

Most would do this in person shortly before shaking hands to seal the deal, but won't on paper. I have no idea why because the potential impact is even greater in ink.

- **Get creative with your bid collateral to convey your character and USPs**

For example, look at the dividers as advertising billboards. They are invaluable real estate to use for campaign messages, story showcases and client callouts. Or why not send a video of your workshop along with your executive brochure? There aren't many better ways for the client to get a feel for you and how you work.

THE BOTTOM LINE

My utopia - where we go back to a time where two CEOs sit down and see the whites of each other's eyes before the box ticking takes place - is destined to remain a dream.

But the good news is this: by infusing your bid material with charisma and creative elements that clearly illustrate who you are, you can leave the client feeling as though they have met you, liked you and are already inclined to give you the business.

I slipped up by not following my own advice for the bid I talked about earlier.

I won't make that mistake again.

Instead of "Now I've met you, I wish I'd have given you the contract," I'm aiming for "I felt like I'd already met you, which is why I've given you the contract" every time.

Do the same and save your gut from a kick it'll never forget.

SPOTLIGHT ON...

Lets be honest, the bid world can be a little serious, so in an attempt to inject some fun into BQ we will be adding the odd human interest piece from time to time. This quarter, we have asked one of our more maverick contributors Simon Wellstead from SMSW Media some quick fire questions.

Q: Greatest achievement in business?

A: I'm still here!

Q: Greatest defeat in business?

A: I can't think of one, there are lots of defeats but I prefer to call them lessons.

Q: Greatest achievement personally?

A: Aside from fooling my wife into believing I was the one for her and the subsequent family ... I'm still here!

Q: Biggest hate & biggest fear?

A: Bed time, I don't like saying goodbye to the day. Biggest fear is being found out that as an MD, I really don't know what I am doing.

Q: What has been your life's biggest lesson?

A: That potential is nothing without belief and action.

Q: What would you change in your past?

A: I would have realised the above sooner than 32.

Q: Guilty pleasure?

A: Aside from butterscotch angel delight, motorcycles, I think about them at least every minute.

Q: Worse thing anyone ever said to you?

A: You're not creative.

Q: Best thing anyone ever said to you?

A: You're not creative!

Q: Funniest thing anyone ever said to you?

A: When I moved to the country, a Farmer had broken down & I asked him what was wrong. He said "Fucking fuckers fucked".

Q: Best advice you have been given?

A: Hire people to cover your weaknesses not your strengths.

Q: Who do you most admire? (no cheese, no family)

A: Nelson Mandela for his forgiveness.

Q: What profession would you like to attempt other than yours?

A: Actor.

Q: What profession would you least like to attempt other than yours?

A: Nurse.

Q: What turns you on creatively, spiritually and emotionally?

A: Freedom, freedom, freedom.

Q: What turns you off?

A: A lack of Chutzpah.

Q: If heaven exists, what would you like to hear God say when you arrive at the pearly gates?

A: "Now go back and do it properly this time".



Final thoughts

I hope you have enjoyed reading this fantastic edition of Bidding Quarterly and that it has provided you with valuable insights into bid excellence and how you can move one step closer to 'bid utopia'. The most common theme was the need for collaboration, both internally and externally, and having a common goal across departments and organisations.

This can only be accomplished with the understanding that you will often be approaching it with a different perspective to your peers in Sales, Marketing, Finance etc. Beth Wallace strongly believes that effective collaboration can also be achieved between suppliers and procurement, meaning barriers can be rapidly broken down on the journey to 'bid utopia'.

It's clear that we often don't have time to be extraordinary, meaning 'bid utopia' remains somewhat out of reach. To counter this, regularly investing time in yourself and your team will ensure that you are ahead of the curve and avoid coming second to your more proactive competitors. As Nigel Hudson says, if you haven't assessed yourself against the market in the last 6 months, you are already complacent and no longer in the top quartile of performers.

As always, a special thank you must go out to all of our contributors. Having their expert opinion on these topics is what allows us to deliver you Bidding Quarterly. If you have something valuable to share and would like to get involved, please contact: enquiry@bidsolutions.co.uk





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Bid Team Leadership & Innovation

Peter is recognised for his strengths in bid team leadership, innovation and performance improvement. One of the first law firm employees to achieve the APMP Certified Professional qualification, Peter is also a winner of an APMP UK national award for Innovation.



PETER BRYANS

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Specialising in strategic cost modelling, estimating and pricing, Peter's 15 year career has seen him at Network Rail, Arup and Detica (now BAE Systems Applied Intelligence) and most recently in senior cost estimating and pricing roles at Aegis and Thales.



BEN HANNON

Recruitment Director, Bid Solutions

Ben is responsible for consistently providing long-term success for our clients in an increasingly competitive market. He understands the culture and winning mentality that ensures we stand out from the crowd.



NIGEL HUDSON

Head of Bid Programmes for Babcock International

Nigel is passionate about professional development. He designed and delivered the APMP award-winning Bid Academy for Vodafone and co-authored Europe's leading proposal syllabus with Strategic Proposals. He's trained more than 4,000 people worldwide.



PIPPA BIRCH

Highways & Civil Engineering Expert

Pippa has been a Bid Writer for over 15 years, working as an employee for major companies within the Highways and Civil Engineering Sector for the first ten. She started freelancing in 2012 which led her to write for companies across a variety of sectors (construction, facilities management, custody and forensics).



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Andrew is an expert in bidding and tendering, specialising in competitive formal bids into EU Public Sector organisations. Andy is an authority on EU procurement legislation and can bring all these capabilities together to initiate and drive major complex bids through to a successful completion.



SIMON WELLSTEAD

Managing Director, SMSW Media

SMSW Media is a creative & marketing agency with one focus – maximising revenue for its clients. Simon's early years working in blue-chip sales means he understands what it takes to grow. His dogged determination to challenge at all levels means that he can cut through the crap and unearth true value propositions.



JON WILLIAMS

Managing Director, Strategic Proposals

Jon and his team work with clients worldwide to help them establish winning proposal capabilities and to capture major deals. He has built and led numerous bid and proposal centres; managed, reviewed and benchmarked countless proposals; worked in over thirty countries, and trained many thousands of course participants.



BETH WALLACE

Procurement Expert

Beth has worked in a number of sectors, starting out in aerospace manufacturing but also working in financial services, media, hospitality and legal to name a few. Her career has spanned both negotiating deals as well as managing supplier relationships, from simple projects to complex outsourcing.



GRAHAM ABLETT

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Graham helps clients to win specific opportunities as well as implementing effective and efficient proposal processes. He is a former board member of APMP in the UK, holding APMP Professional status, and is an APMP Approved Trainer.



MARTIN SMITH

Managing Director, Bid Solutions

I am passionate about helping clients win new business. With increasingly savvy procurement professionals, more competition and new technology changing the way we bid, it is my job as Managing Director to ensure we offer you market leading people, tools, training and solutions to help you win more business.



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