

Building a highly effective proposal team

Everything you need to know to build a winning team with advice from Bid Solutions



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Introduction

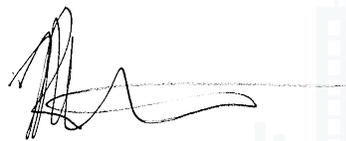
Qorus works closely with proposal teams around the world. We work with teams in different industries and of varying size and maturity, and they all have one thing in common: they're actively looking for ways to improve the way they work.

We enjoy learning about the highs and lows of leading and working in a proposal team and of course, we love helping these teams overcome their challenges.

This guide is a collection of the best advice we have gathered from clients, partners and industry leaders, and our hope is that it will help you build a bid or proposal team that is effective, motivated and ready to face the future.

We'd love to hear what you think of the guide, and to share any additional insights you have. To learn more about how we're helping to empower teams through our proposal management solution, please do get in touch.

Yours sincerely,



Ray Meiring
CEO and Co-founder
Qorus Software



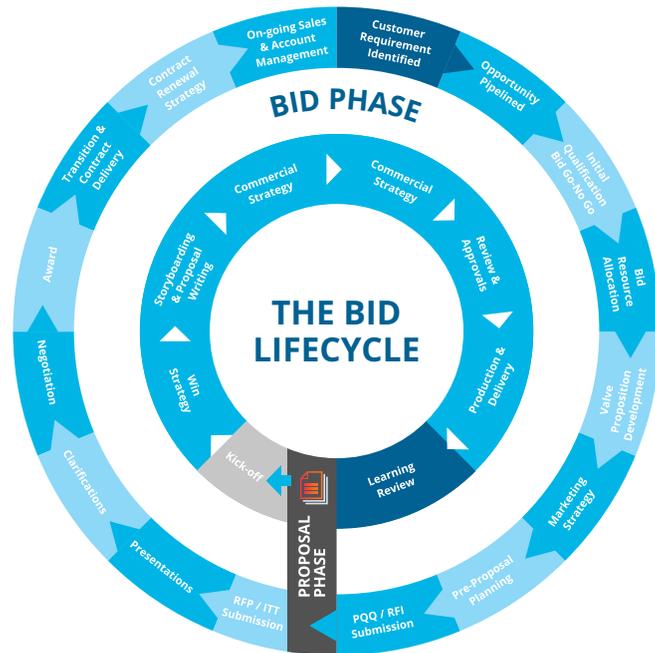
Designing a high performing bid team

Designing a high performing bid team

According to [Bid Solutions](#), the leading provider of bid and proposal professionals, a high performing bid team is one that is consistently able to win new business. It proactively brings together bid managers, subject matter experts and core stakeholders, managing them effectively and efficiently through every stage of the bid lifecycle.

The team knows how to put its organization in the strongest possible position to win the business it is bidding for, while implementing appropriate governance and managing associated risks – a capability that is becoming increasingly important as we continue to see a rise in requests for proposals and other documents with increased focus on compliance.

A high performing bid team is a key differentiator for organizations of all sizes and across all industries.



Effective bid teams bring together bid managers, subject matter experts and core stakeholders, managing them effectively and efficiently through every stage of the bid lifecycle.

Source: https://bidsolutions.co.uk/wp-content/uploads/2016/01/1pp_Bid-Lifecycle.pdf

Setting your team up for success requires matching people with the right knowledge, skills, training and communication styles, to the right roles and responsibilities. But it doesn't end there. Proven and repeatable processes, practical support and the most appropriate tools and technology are key elements of effective proposal teams.



Proven and repeatable processes, practical support and the most appropriate tools and technology are key elements of effective bid teams.

**People are the
pinnacle**

People are the pinnacle

Of course, your people are the most important resource you have. Hiring the right ones is key, so it's important that your recruitment process is robust.

According to [Bid Solutions](#), candidate assessments should take the following into account:

- ✓ Relevant experience
- ✓ Personality (attitude, motivation, maturity, capacity to learn and general temperament)
- ✓ Cultural fit
- ✓ Evidence-based responses
- ✓ Proof of competence (assessments could include writings skills, verbal & numerical reasoning, presentation skills and psychometrics)
- ✓ References

Your hiring process should be informed by solid job descriptions that are a true reflection of the responsibilities required for each role. We'll explore this in more detail in the next section of this guide.

The power of diversity

At this point, it's worth taking a moment to consider the importance of diversity as you shape your team.

Diversity is defined as the condition of having or being composed of differing elements, for example the inclusion of different types of people (such as people of different races or cultures) in a group or organization.

In the last few years, the term has received much airtime in the business world as we come to realize just how un-diverse many of our companies, groups and communities are.

While it's human nature to gravitate towards sameness – we instinctively understand people who are just like us – it isn't conducive to success. After all, if we all had the same background, world view and approach to problem solving, we would not achieve anything new.

Sure, it's about being inclusive and treating people equally – no matter their age, race, ethnicity, gender or sexual orientation – but it's also about much more than that. It's about creating a workforce that is broad in its experience, ideas, insights and problem-solving abilities. And if your business communicates with people at all (which business doesn't?) then it's about ensuring that you talk to each of your customers in the most appropriate manner.

When you think about it in these terms, diversity really can become a key differentiator.



Ethnically diverse companies are more than **35%** more likely to outperform their industry counterparts. Even more significantly, each **10% increase** in racial and ethnic diversity on the senior executive team yielded on **average a rise of 0.8% in earnings** before interest and taxes.

2015 McKinsey study



Diversity is a competitive advantage

Jennifer Fonstad is a serial entrepreneur and veteran venture investor. Last year, she authored a brilliant article on the competitive advantage of diversity, published on TechCrunch. As she says, “We are only just beginning to understand all of the unique ways in which diversity drives competitive advantage.” She then lists what we know so far:

- ✓ Diversity builds beneficial networks: A balanced and diverse leadership team brings new networks into a company that can be used to attract talent, build business relationships and sell products.
- ✓ Diverse leadership brings the right skills at the right time: Studies show differing leadership styles in an organization bring essential qualities that matter as a company grows — aggressive, action-oriented approaches tempered by collaboration, listening and tolerance, for example.
- ✓ Diversity provides insight into the customer: Most companies sell into an increasingly diverse customer base; mapping experiences, perspectives and networks internally to better mirror customers drives increased sales.

Diversity in proposal teams

We recently hosted a webinar, during which we presented the results of our [2017 proposal management survey](#) and asked our panelists to comment on the importance of diversity in bid teams.

Amy Singer, Head of Bid Management, Americas at Hitachi Vantara, agreed saying: “it’s important to include younger people in your team because technology advances so rapidly that the way we talk about things in business has to become much more youth-oriented. Having younger people on the team gives you a fresh perspective and allows you to have a wider view of how your solutions are impacting your customers.”

Zena De Kasha, Senior Manager of Bids & Proposals North America at Insight, shared the following: “I have worked in all sorts of teams over the years, and it’s clear that men and women have different strengths, viewpoints, ideas and insights, which all help in problem solving.”



For more information please visit the ‘Women in Bids’ interest group:

<https://www.linkedin.com/groups/12101608/profile>

Define roles and responsibilities early

Define roles and responsibilities early

Before you can recruit effectively, you need to create written job descriptions for each position. Job descriptions outline each role and related responsibilities and are valuable tools when it comes to performance management.

They:

- ✓ Shape job advertisements and agency briefs.
- ✓ Serve as a foundation for conducting interviews and comparing candidates.
- ✓ Are a benchmark when setting salary bands.
- ✓ Ensure that the people you hire are worth their compensation.
- ✓ Set clear expectations for employees.
- ✓ Provide a blueprint for employee reviews, salary increases and career planning.
- ✓ Serve as legal documentation in the event of termination or discrimination lawsuits.

Hire for experience or education?

"There needs to be a balance between experience and theory. Training on best practice is very useful and will give guidelines as to how people should react in certain situations but how many organizations can really say they follow 'best practice' process religiously on every deal?"

- Ben Hannon, Bid Solutions

Understand the six core roles

According to Bid Solutions, there are six core roles that make up high performing bid teams:



Bid Manager



Proposal Manager



Proposal Writer



Bid Coordinator



Knowledgebase Manager



Graphics / DTP Manager

Bid Manager

The Bid Manager assembles a team with the service, product and business knowledge required to prepare a winning bid and takes ownership of the end-to-end bid process. They are typically responsible for managing an opportunity from qualification through to contract award, including strategy development, solution development, commercial considerations, partner identification and risk management.

Core responsibilities

- ✓ Managing the bid qualification (bid go / no go) process for new opportunities.
- ✓ Managing virtual bid teams and inputs from a variety of stakeholders, typically involving contributions from sales, marketing, product teams, finance, commercial, legal and delivery.
- ✓ Preparing and reviewing the commercial aspects of the bid, ensuring all services are included in the final price to the customer.
- ✓ Risk tracking and management throughout the bid process.
- ✓ Contributing to the written proposal - both in terms of content and presentation (such as preparation of a management summary).
- ✓ Managing the bid budget.
- ✓ Ensuring timely delivery of compliant and commercially sound bids.
- ✓ Understanding and resolving complex technical, strategic and business issues.
- ✓ Arranging all post-bid reviews with customers, post contract award.

Experience

When hiring a Bid Manager, look for proven capability in delivering winning, multi-million-pound product or complex services opportunities. Experience of bid campaign management from opportunity identification through to project delivery is key, as this person must provide valuable input into opportunity qualification, win strategies, commercial discussions and solution design.

Your Bid Manager should be comfortable working at CEO / Director level (internal and external customers), and fully conversant with the competitive marketplace. They should possess sound commercial understanding, P&L and risk management skills, as well as the ability to manage complex, multi-workstream opportunities. And finally, look for attention to detail, good communication skills and a solid understanding and implementation of internal governance procedures.

For more, visit <https://bidsolutions.co.uk/clients/hiring-guide/job-descriptions/bid-manager/>



Proposal Manager

The Proposal Manager will coordinate and produce the proposal (RFI, ITT, RFP etc.) and assemble a proposal team with the service, product and business knowledge required to win. Responsibilities include introduction and implementation of all necessary proposal procedures and processes.

Core responsibilities

- ✓ Delivering compliant, professionally produced proposals within customer-defined timeframes.
- ✓ Coordinating and reviewing proposal input from a variety of stakeholders, typically involving contributions from sales, marketing, product teams, finance, commercial, legal and delivery.
- ✓ Communicating and influencing at a senior level.
- ✓ Coaching sales teams and SMEs in persuasive writing and proposal best practice.
- ✓ Managing proposal automation software.
- ✓ Managing document templates in line with company branding.

Experience

When hiring a Proposal Manager, look for proven ability in planning, producing and delivering compliant proposals within a complex business environment. The Proposal Manager should be experienced in scheduling and running proposal kick-off meetings, leading storyboarding sessions, facilitating key review meetings, coordinating proposal governance and sign off, and delivery of the completed proposal. Ideally, they will have experience of coordinating and updating a proposal or content management system.

For more, visit <https://bidsolutions.co.uk/clients/hiring-guide/job-descriptions/proposal-manager/>



Proposal Writer

The Proposal Writer produces professionally written proposal content that clearly articulates your organization's value proposition.

Core responsibilities

- ✓ Leading storyboard sessions with bid / proposal team members and key stakeholders.
- ✓ Proactively developing and managing a network of SMEs.
- ✓ Assisting the Bid / Proposal Manager in developing a proposal structure.
- ✓ Identifying and re-working existing pre-written content where relevant.
- ✓ Delivering completed written proposal responses to the Proposal Manager against agreed RFP deadlines, escalating issues as required.
- ✓ Editing proposal responses from a variety of stakeholders, typically involving contributions from sales, marketing, technical / product teams, finance, commercial, legal and delivery.
- ✓ Coaching sales teams and SMEs in writing best practice.
- ✓ Presenting all new proposal content to the Knowledgebase Manager for potential re-use.
- ✓ Working in or managing proposal software.

Experience

When hiring a Proposal Writer, look for proven skills in producing and editing proposal content within a complex business environment. The Proposal Writer should be experienced in leading storyboarding sessions, participating in key review meetings, content sign off and document production. Experience of coordinating and updating a knowledgebase system is beneficial.

For more, visit <https://bidsolutions.co.uk/clients/hiring-guide/job-descriptions/proposal-writer/>



Bid Coordinator

The Bid Coordinator coordinates and produces the bid or proposal response document. Responsibilities include introduction and implementation of all necessary document version control procedures and processes.

Core responsibilities

- ✓ Producing and delivering compliant, professionally produced proposals within customer-defined timeframes.
- ✓ Coordinating proposal input from a variety of stakeholders, typically involving contributions from sales, marketing, product teams, finance, commercial, legal and delivery.
- ✓ Championing document management and change control best practices.
- ✓ Ensuring proposal documents follow standard formatting and quality standards.
- ✓ Providing advice on flow, language and grammar to content owners.
- ✓ Consolidating sections and documents developed by others into the required tender format.
- ✓ Maintaining and making available master document sets.
- ✓ Ensuring consistent branding for all company specific documents.
- ✓ Managing proposal software.

Experience

When hiring a Bid Coordinator, look for proven ability in planning, producing and delivering compliant proposal documents within a complex business environment. The Bid Coordinator should be experienced in attending proposal kick-off meetings, participating in storyboard sessions, attending review meetings, managing document governance and sign off, print production and delivery of the completed proposal.

For more, visit <https://bidsolutions.co.uk/clients/hiring-guide/job-descriptions/document-manager/>.



Graphics / DTP Manager

The Graphics Manager is responsible for creating high-impact graphics and proposal images that contribute towards a winning proposal. They will work as an integral part of the proposal team to ensure all customer facing documentation is of the highest visual impact.

Core responsibilities

- ✓ Supporting the proposal team in the production of customer-facing documentation that is consistently of the highest quality and impact.
- ✓ Developing proposal graphics that have impact and are easy to interpret.
- ✓ Creating and managing a range of document and presentation templates.
- ✓ Ability to work in a deadline driven environment without compromising artistic creativity.

Experience

When hiring a Graphics or DTP Manager, look for experience in the production of proposal graphics for use both in electronic and hard copy materials. It's also important that this person is able to work well with SMEs to turn written and numerical content into compelling graphical representations.

Look for someone who is confident working with a range of software and design tools to create graphical output that can be incorporated in tender documents and accompanying materials such as CDs, brochures, document wallets, delivery cartons, websites, and other media as required.

To learn more, visit <https://bidsolutions.co.uk/clients/hiring-guide/job-descriptions/graphics-manager/>



Focus on skills development and training

Focus on skills development and training

Our [2016 annual proposal management report](#) focused on bid team training and career planning. We found that, even though 86% of respondents worked in bid teams, and 45% had over ten years' experience in the industry, 68% held no proposal-related qualifications.

A woeful lack of focus on training and skills development

30% of respondents hadn't come across the Association of Proposal Management Professionals (APMP) before, and only 14% described the proposal qualifications available as 'vital'. This is surprising. It seems that most are still reactive and learning through trial and error, rather than proactively building effective, best practice-based bid departments.

When it comes to company-sponsored training, 37% said that they have no training budget. One of guest panelists, Tracie Bretecher from Long View Systems remarked: "I would venture to say that the organizations that don't provide budget for proposal management don't understand that it is a certified profession and not an administrative role."

On top of this, 56% of respondents said that their company does not offer any in-house training. Those companies that do offer training, most often offer it in the form of workshops and tutorials and informal mentorships.

Even though 62% of respondents said that they prefer to learn in a live, face-to-face environment, only 15% of respondents regularly attend industry events.

How to train your team

There are several approaches to team training, which can be matched to your team's size, skill level and budget.

Formal training

The Association of Proposal Management Professionals (APMP)

[APMP](#) is the worldwide authority for professionals dedicated to the process of winning business through proposals, bids, tenders, and presentations.

They have several training opportunities, including a certification course that you can complete online or at a live event.

In a 2018 Salary Survey by Bid Solutions they found that:

48%

of respondents have no personal development plan.

59%

of respondents haven't attended any training during the past 12 months. Only 1 in 4 respondents have attended some form of external training in the past 12 months.



Luckily there's a lot of helpful material available, including the Shipley book. You may not be able to get certified but there's no reason you can't access information, read it, and start sharing that knowledge.

They host the annual [APMP Bid & Proposal Con](#), the world's largest conference for proposal, bid, tender, capture, business development and graphics professionals. If you can afford it, we recommend attending this event for:

- ✓ Hands-on education & certification
- ✓ Insight and cutting-edge content from industry leaders and inspiring keynotes
- ✓ Networking opportunities

Shipley Associates

[Shipley](#) is a global professional services firm focused on helping clients compete for and win business. They offer a blended learning approach to train and certify capture and proposal professionals.

Training includes:

- ✓ On-site, corporate training
- ✓ Self-paced, on-demand training
- ✓ Live online courses
- ✓ Public workshops

Informal training

If budget is a challenge, consider creating an informal training program for your team. This program can include:

- ✓ Listening to educational webinars for APMP and Shipley
- ✓ Inviting experienced proposal managers from other companies to share their experience
- ✓ A mentorship program that leverages your more experienced employees
- ✓ Quarterly training days run by you or an external consultant
- ✓ Reading Bidding Quarterly, a quarterly magazine that provides insight and opinions of industry experts:

<https://bidsolutions.co.uk/bidding-quarterly>



**Make sure they have the
content they need**

Make sure they have the content they need

Once you have the right people with the right skills in place, you need to ensure that they have access to all the information they need. This information comes from a combination of sources, usually:

- ✓ A content database
- ✓ Subject matter experts
- ✓ The sales team

The content database

A content database or knowledgebase is a centralized library of re-usable content that goes into pitches, proposals and RFP responses. When set up and managed properly, your content database is a powerful efficiency driver.

A good database is easy to use, has logical content categorization and search filters, and allows you to create workflows that ensure content is up to date and approved.

You'll often find a content database in a proposal management tool like Qorus.

A good content database will give your team confidence that the content they retrieve is complete, current, on brand and on message.

It should be easy for SMEs and other contributors to populate the library so that it grows over time.

The power of templates

Consider creating a template library to ensure all pitches, proposals and RFPs are always correctly branded, regardless of who produces them.



Qorus for proposal management

Qorus plugs into Microsoft Office and integrates with a wide range of CRM and CMS solutions. A user-friendly online portal offers real-time views of proposal progress and simplifies project management.

SharePoint co-authoring enables users to collaborate on bid or pitch documents simultaneously. Robust document workflows ensure that re-usable content is stored and regularly updated by subject matter experts.

- ✓ A content library with Google-like search capability
- ✓ Easy co-authoring and collaboration
- ✓ Guided carts for highly automated proposal production
- ✓ Tight integration with CRM and other enterprise systems
- ✓ Automated allocation and approval workflows
- ✓ Project dashboards and reporting



Subject matter experts

Getting SMEs to contribute to your proposal in timely fashion is difficult! They're usually senior employees with deep product, service, industry or company knowledge – which means they usually pretty busy people. It's not surprising that answering RFPs is not their top priority.

Every year, we find that collaborating with SMEs is one of the top three challenges faced by the proposal professionals who complete our proposal management survey.

As must-win tender expert, [Robyn Haydon](#), puts it “proposals may be a 9-5 job for your team, but they're a 5-9 job for other people in the business”.



“Of course, we all know that proposals are not high priorities for SMEs, most of whom are working directly with customers, but I have found that once they buy in to the opportunity, they're much more willing to give you that support.”

Zena De Kasha, Senior Manager Bids & Proposals, North America, Insight



“It's always tough to get SMEs to contribute on time. I have found that proposal software can remove a lot of the hassle and make it easier for them to create, suggest and approve content. If you can convince them to do this, they'll spend far less time answering the same questions over and over again.”

Amy Singer, Head of Bid Management, Americas, Hitachi Vantara

The sales team

When it comes to big decisions, including go/no-go decisions and win strategies, no one has better insight into the client than the person who has got them to this point in the purchasing journey.

Sales teams must ensure that the proposal team has a clear understanding of the client's aims, which will be lacking if they have not been directly involved with customer-facing discussions.

Open communication with the sales team also ensures that bid teams gain a broad perspective on what the client is looking for and their preferred way of working. Ideally, your sales team is capturing important information about prospects throughout the sales process.

Key questions include:

- ✓ Why is the company looking for a new vendor?
- ✓ What went wrong with their previous relationship?
- ✓ What are their goals and priorities?
- ✓ What is their budget?
- ✓ Which of our competitors are bidding?

A little forethought and a few well-placed questions can deliver valuable information that will help your bid team increase its win rate.

Collaboration and co-authoring

Real-time proposal collaboration and co-authoring will speed up the bid process and simplify version control.

Dedicated proposal management solutions like Qorus enable live document co-authoring, allowing SMEs, sales teams and other contributors to collaborate on the proposal at the same time.

All updates and changes are saved, so that contributors are always working on the latest version of the document.

The importance of proper processes

The importance of proper processes

One of the most widely recommended and used proposal processes was developed by Shipley Associates. The entire process contains 96 steps. Shipley offers a handy Gantt view of it [here](#).

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.

The basic proposal process



Key elements of a good proposal process

According to the APMP, a good proposal **development process** should be:

- ✓ Scalable
- ✓ Flexible
- ✓ Repeatable
- ✓ Documented

It should have:

- ✓ A clear owner
- ✓ Training available to inform, support and reinforce
- ✓ Document-based reviews to control and add value
- ✓ Milestones with verifiable inputs and outputs

For more information, visit <https://www.slideshare.net/Bid-to-Win/proposal-process-management>

Give them the best tools

Give them the best tools

The appropriate proposal technology can make a huge difference to your team effectiveness and efficiency.

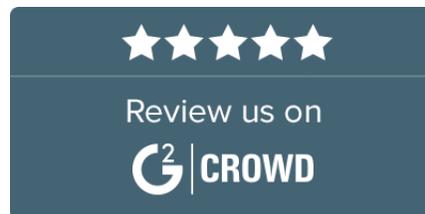
Saving, managing and controlling all your proposal content in one place, and making it easy to search and retrieve, will enable bid and sales teams to create first draft pitches, proposals and RFP responses faster, so they can spend more time strategizing, personalizing and reviewing content.

As with any solution, you'll want to make sure your proposal management solution is one that:

- a) People will actually use
- b) Will enable knowledge sharing and collaboration
- c) Support your processes

We suggest looking for a solution that provides all the features your organization needs, is as easy as possible to use, and is properly supported by the vendor. You'll also need to be realistic about the level of commitment needed from different teams, including bid, sales, IT and marketing – all of whom will need to be brought on board to support the implementation.

Software review sites like G2Crowd and Capterra are good places to start.



14 questions to help you find the best tool for your team

1. What benefits are you looking to achieve with proposal management software?
2. What efficiency factors are you looking for?
3. Would adoption assist with any form of compliance?
4. Do you expect a successful project to increase your sales revenue (close more business, close more business faster)?
5. What is the cost of not doing this?
6. What is the deadline for procurement / roll out / adoption?
7. Can you define the key metrics that will be used to confirm success / to allow on-going investment / drive broader adoption?
8. What return on investment / other factors need to be met to justify investment?
9. Can budget be made available within the financial year or does this project need to be delayed until the next financial year?
10. Are you looking for an on-premise or cloud solution?
11. Who will be the main / secondary users (how many / which type of licenses are required)?
12. Do you need to get buy in / approval from corporate I.T / Information Security?
13. Who will be the project sponsor (this contact will drive system design, personalization, deployment, training, roll out and adoption)?
14. Who else needs to be involved in evaluation, procurement, deployment and support?

About Qorus

How Qorus Software's proposal tool encourages collaboration

Qorus is an intuitive, Microsoft-based proposal management solution that simplifies and accelerates proposal engagement.



Book a demo today

We'd love to show you how Qorus works. Simply leave your details here and we'll be in touch!

SCHEDULE A DEMO

Accelerate the RFP process

- ✓ Respond to a greater volume of RFPs without the need to hire more resource
- ✓ Set up a new project, add team members, and select CRM opportunity to automatically tailor your content
- ✓ Open Q&A pairs library without leaving your document, and drag and drop answers

Make real-time RFP collaboration a breeze

- ✓ Enable subject matter experts to collaborate on the document simultaneously, from anywhere in the world
- ✓ Highlight questions and allocate to team members instantly (automatic email reminders will be created)
- ✓ No email chains or versioning problems

Ensure RFP content improves over time

- ✓ Every time you answer an RFP and add new questions to the Q&A pair library, you accelerate future RFP responses
- ✓ Instantly send RFP answers into the database to be used next time
- ✓ Suggest edits if you see that an answer needs correcting

Increase sales team efficiency

- ✓ Extend Qorus to the sales team to help them engage with prospects and create pitches and proposals in minutes
- ✓ Powerful search functionality enables the sales team to quickly find marketing materials, sales enablement content and answers to FAQs
- ✓ Guided wizard uses pre-approved content and branded templates to create pitches and proposals
- ✓ Can be accessed from Qorus portal or directly from the Opportunity view in CRM

Empower decision makers

- ✓ See exactly how your bids are performing, how much they're costing, and which content they're using
- ✓ Track project status, content usage and win rates
- ✓ Track how much time was spent by each person who contributed to a project and measure ROI





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