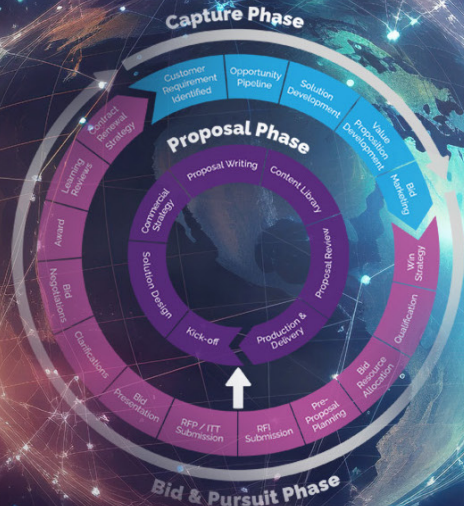


BQ

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BIDDING QUARTERLY



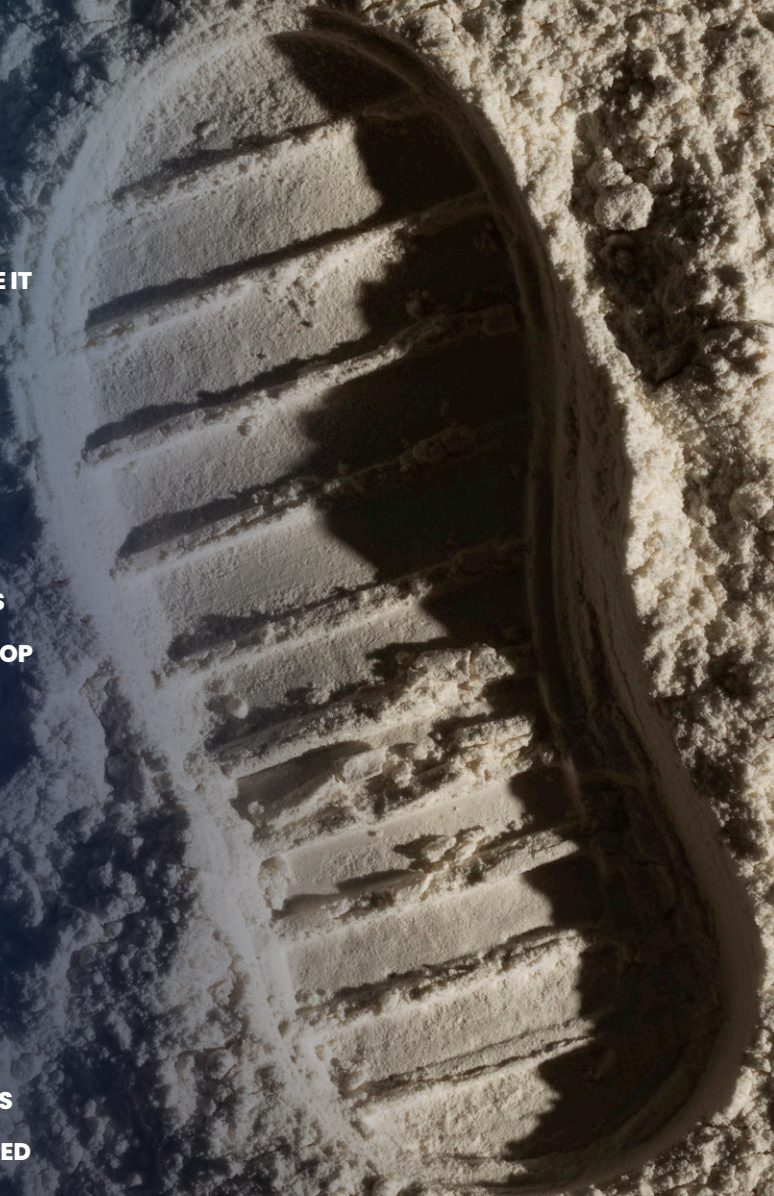
EXPLORING THE BID LIFECYCLE

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Connecting Winners

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FOREWORD

MARTIN SMITH

To 'see the wood for the trees' in our profession, we must diligently navigate the current overwhelming volume of efficiency, productivity and win rate stats being shared by users of the latest technology. It is very easy to understand why you might trust tech as the answer to all your bidding prayers. Or you might believe the opposite and feel somewhat isolated – even anxious – for not embracing the latest tech and its ideology.

Most of the solutions you're hearing about are focused on proposal writing – which is just one of the Bid Lifecycle's 24 interlinked, work-winning phases. Each phase is essential. Any phase can quickly derail your chances of winning if you disrespect it or fail to understand what your customer might need from it. The technology now on the market exceeds anything I have seen in 30 years of bidding but to win consistently, we must ensure all 24 phases of our work-winning cycle are optimised and fit for purpose.

So, do you focus on the 'tree' which offers the Holy Grail of proposal writing, or do you step back and admire the entire forest? Or perhaps, you do both?

I recently saw a stat claiming an "increased speed to draft by 80%". This truly is a phenomenal stat – but unless speed to draft is one of your root causes for losing business, the efficiency gain adds little to the top line. It may allow you to make a few redundancies and save some money, but will it win you more business in the long run? It's certainly a possibility, and there is evidence in the market that points to it.

Extra time available may allow for a comprehensive Bid Lifecycle review, benchmarking existing processes, identifying weaknesses and adopting new practices. Being brutally honest with yourself/your organisation about why you lose and what you could and/or should improve may make the bigger picture clearer.

BQ19 offers you 32 fantastic articles from our brilliant panel of Experts, exploring all phases of the Bid Lifecycle. They offer step by step advice for fine tuning your approach to meeting your clients' requirements and improving your win rate. Technology will undeniably be part of your solution, but it is only one tool. BQ19 will help you consider ALL the fantastic ways (tech and non-tech) you can increase your productivity and, ultimately, your success. I hope you enjoy it.



ABOUT THE BID LIFECYCLE

The Bid Lifecycle is your step-by-step guide through the work-winning process. It is comprised of three interconnected phases – Capture, Proposal and Bid & Pursuit.

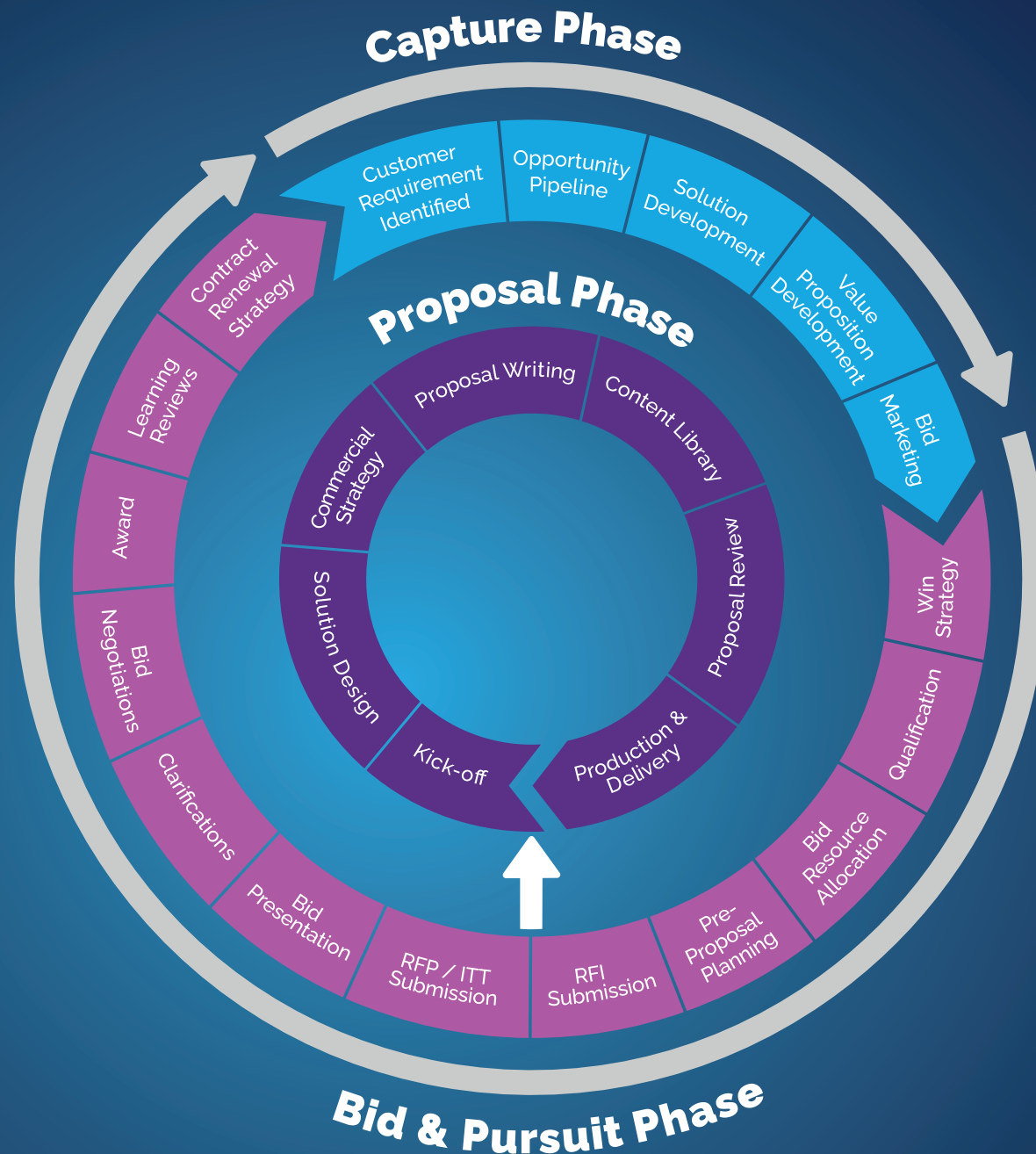
It has been developed and refined for over 15 years to help you win more business.

The Capture Phase focuses on how you influence your client's requirements and position your solution early. The Proposal Phase focuses on crafting a professional, high-scoring written response. The Bid & Pursuit Phase examines the key activities required for both pre- and post-proposal activities. Each of these key phases is broken down into smaller phases – 24 in total – to help you take a strategic and comprehensive approach to winning more work.

Our unique Bid Lifecycle will guide your work-winning bid, proposal and capture teams no matter where your bid process starts – but the sooner, the better. Starting later in the cycle may require considerably more effort to influence your client and put you in pole position.

Engaging the right people at the right time in the Bid Lifecycle is crucial. Some phases require more experience, skills, or industry knowledge. This highlights the importance of role-specific skillsets at key phases and the subtle differences between bid roles. To learn how our profession's six core roles interact and complement each other across the Bid Lifecycle, [click here](#).

Interested in learning more? You can take the [Bid Lifecycle challenge here](#).



REVVING UP YOUR BIDS: THE NEED FOR SPEED DOESN'T MEAN CUTTING CORNERS

I have always wanted to shoehorn motorcycles into a BQ article, so here goes...

A good friend of mine, Jonny, ran the Honda TT Team a few years back. He told us, "The faster you need to go, the more planning and precision is required." This was his biggest lesson in the business world. Speed often means 'what can be skipped' to get to the finish line. However, those who sprint parts of the process can gain massive advantages.

Like racing the TT, speeding through Ballagarey at +130mph, every second counts. With fast turnaround bids, you need to go fast, but skipping crucial steps in preparation is like forgetting to top up the brake fluid—you're courting disaster.

Here's how to keep your bid on track and avoid a 200mph crash.

The Pre-Race Check: Solution Development

Jonny said, "In a race team, it is incredibly important that everyone knows the plan; that means communicating it in the simplest terms." No different with your solution. Don't aim at the technical person in the room; aim at the least technical. If they nod along, you're in good shape. If you can sketch it on a whiteboard, even better! That's your pre-race check.

Tip: In a room full of experts, it can feel like you're in the pit lane surrounded by clever engineers. Simplify the jargon.

Draw the solution out, then explain it back to them in plain English. This helps you understand and ensures the team is aligned.

Jonny says: Simplifying the solution for your audience is like tuning your bike for a specific track. It's not just about speed but ensuring every component works seamlessly. Get it right, and you're on the road to victory.

The Race Strategy: Value Proposition Development

Even in a last-minute sprint, you need a solid strategy. Here's your quick pit stop:

- 1. Profile Customers:** Choose personas like you'd pick your racing line—one technical, one non-technical. Know their roles and challenges.
- 2. Identify Pains and Gains:**
 - Pains: Their version of hitting the gravel? Deadlines, board reports, technical hiccups?
 - Gains: Their checkered flag? Efficiency, recognition, peace of mind?
- 3. Match Your Offer:** Align your solution with their needs. Make them the hero crossing the finish line.

Outcome: This sprint sharpens your value proposition and unearths stories and examples - your race day anecdotes that can clinch the win.

The Final Lap: Bid Marketing

Bid marketing often gets overlooked, like a racer neglecting their tyres, but is essential for that last burst of speed.

- **Create a simple brief for your marketing team:** Think of it as your race plan (include):
 - Solution Overview: One-page summary
 - Target Details: Sectors, job titles, groups
 - Messages and Win Themes: Key points to hit
 - Content Examples: Case studies, articles - proof of your prowess

Jonny's Advice: Start with top-of-funnel content. It's like warming up your tires - essential for grip as you hit top speed. Over time, this strategy will keep you in the race for future bids.

Conclusion

In an ideal world, you'd have time to fine-tune every part of your bid. But when you're racing against the clock, a sprint approach can still get you across the finish line. Simplify your solution, understand your customers, and market smartly. Remember, it's not just about speed but precision. Keep these in check, and you'll avoid crashing and burning.

Stay sharp, stay fast and Godspeed.



KEEPING CAPTURE PLANNING SIMPLE

Capture Planning is not Wizardry or the Dark Arts

First of all, a quick definition: For me, a capture plan is a live, ongoing document outlining the roles, steps and activities a team will undertake to win a specific opportunity (often a project or service) in advance of a formal request from a client.

When I first heard of Capture Planning, I initially thought this was a wizardry approach to sales planning. I had this idea of top-secret teams beavering away in guerilla-style backrooms, manipulating unwitting clients to choose a particular company. The whole idea reminded me of the Dark Arts or PSYOPS (psychological operations) for bid teams.

Fast forward ten years and now I think very differently!

Aligning with your client's timeline

The first thing to remember is that effective capture planning coincides with what procurement teams do every day. As part of long-term planning, many organisations need to think and plan in detail well in advance of the release of Request for Proposals – often a year or two. A capture plan simply aligns with that timeline. By understanding how your client thinks, and in what timeline, you are already at an advantage by putting yourselves in their shoes.

Keeping it simple

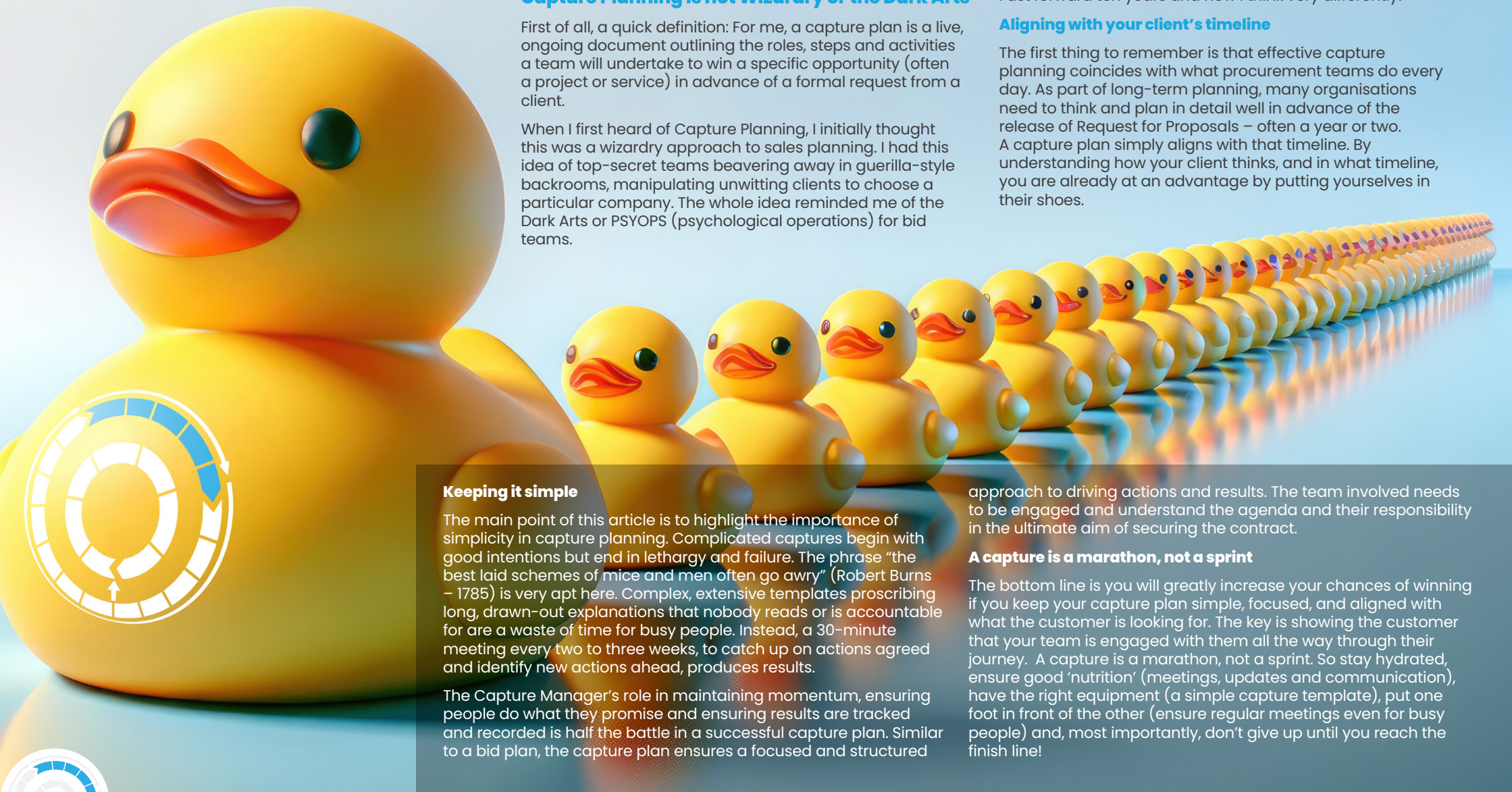
The main point of this article is to highlight the importance of simplicity in capture planning. Complicated captures begin with good intentions but end in lethargy and failure. The phrase “the best laid schemes of mice and men often go awry” (Robert Burns – 1785) is very apt here. Complex, extensive templates proscribing long, drawn-out explanations that nobody reads or is accountable for are a waste of time for busy people. Instead, a 30-minute meeting every two to three weeks, to catch up on actions agreed and identify new actions ahead, produces results.

The Capture Manager's role in maintaining momentum, ensuring people do what they promise and ensuring results are tracked and recorded is half the battle in a successful capture plan. Similar to a bid plan, the capture plan ensures a focused and structured

approach to driving actions and results. The team involved needs to be engaged and understand the agenda and their responsibility in the ultimate aim of securing the contract.

A capture is a marathon, not a sprint

The bottom line is you will greatly increase your chances of winning if you keep your capture plan simple, focused, and aligned with what the customer is looking for. The key is showing the customer that your team is engaged with them all the way through their journey. A capture is a marathon, not a sprint. So stay hydrated, ensure good ‘nutrition’ (meetings, updates and communication), have the right equipment (a simple capture template), put one foot in front of the other (ensure regular meetings even for busy people) and, most importantly, don't give up until you reach the finish line!



SELECTIVITY AND SOLUTION IS EVERYTHING

JEREMY BRIM

We have found two common mistakes when working with clients who deploy capture to develop and improve their win rates and growth trajectory – being intelligent in opportunity selection and co-solutioning unbeatable delivery models with the client.

Capture target selection

By its nature, capture requires focus and selectivity. Running successful capture campaigns draws in a great deal of resources from across functions, with opportunity cost involved. It is highly unlikely you will have the capacity to deploy capture appropriately for every deal you bid. We advise picking three top pursuits per year, that are between 12 and 18 months from tender, and go from there.

Selecting the right opportunities can become a political hot potato. Senior figures often back the wrong horses and very often assume capture should be for exciting new deals with new clients. I challenge them hard on this. On average, 80% of the margin of a B2B or B2G business comes from 20% of its clients. We work extensively in the key account management space to optimise and grow from that base, aiming to expand top accounts, add to the client list and deselect the non-profitable clients. But how you direct capture efforts is the next important link in the chain. If you follow the logic through, you should deploy capture on your most important rebids with current clients far more often than on new client opportunities.

Solution

There is nothing worse than being in the middle of a live bid and realising your solution is behind the curve compared to the competition. I spend a great deal of my life training people in how to write winning proposals. But it is all for nothing if a competitor can demonstrate they can save the client far more money or time, or generate other greater value that registers with the stakeholders.

The general best practices taught in the market are skewed toward bid prep as they were developed by bid writers. When actually, the first principle of capture should be to negotiate the opportunity with the client, with shaping of a competitive procurement to your advantage the fallback position. Co-solutioning with the client is a key, and often missed, step in going on the journey. If you

can facilitate getting your key delivery leaders in a room with client decision makers, shaping their specification – magic can really happen. You build relationships, establish trust and shape the specification and procurement to create the maximum value for the client. Everyone wins.

Call to action

Selection and solution have a dramatic impact on win rates but much of the above is beyond the control of many in bid teams. In my view, however, the most successful B2B and B2G organisations put their bid team at the heart of their growth operating model. Building your influence and leveraging data to show how focus and solution can transform outcomes is game-changing. If you don't work in a business that wants to hear it, perhaps talk to Martin about finding a place that does.



WHICH COMES FIRST? SOLUTION DEVELOPMENT OR THE KICK-OFF MEETING?

Many businesses tell me, “We follow an industry standard process for bids.” Which is fine – I’m a big fan of a well-established review process. However, many of those processes are remarkably silent about solution development including when and how it takes place.

The issues I see are most often among companies opting to develop their solution during the proposal writing phase. Often this is linked to the way the company is structured. If the Sales Team follows and qualifies leads – and is influential in making the decision to bid – then it is usual for the bid to be passed to a Bid Team to develop. In many organisations, the decision to bid for an opportunity is followed by a flurry of activity such as Hot Button, Win Theme and Value Proposition workshops. Internal governance processes can be tricky to navigate, so effort is put into ensuring that everybody who should know about the bid, does know about the bid. Diaries are booked with review meetings, leave is cancelled, commercial discussions and competitor analyses kick off in earnest.

Solution architects may not become involved until several weeks down the line when it’s time to write the response to a complex technical question. The solution architect is the subject matter expert who looks at (and really understands) the client’s requirements, compares them with our go-to solution and announces, “We can’t do it.” At this point, too much cost and effort has gone into developing the proposal to cancel the bid or to redevelop the solution. In addition, too many reputations are at stake. This is when poor quality proposals can arise, with ill-fitting solutions hammered in sideways to keep the price competitive.

Sound familiar? So, when should you work on solution development?

I encourage the businesses I support to start their solution development before the Bid/No Bid decision. I’m a big advocate of bringing in solution architects early to help sales teams qualify the opportunity. This enables you to get

under the skin of the client’s requirements to identify what the client wants, needs and fears – and to ensure we can meet (or exceed) their requirements within budget. The devil, they say, is in the detail: enthusiastic Sales Directors often rush to bid, whereas seasoned solution architects often spot something that will nobble our go-to solution. Our go-to solution, or a close variant, is our best friend because we have the evidence, statistics, benchmark costs, credibility, references and case studies to support our response. The less we have to reinvent, the better our chance of winning.

In my experience, we achieve a better solution from the start when solution architects’ findings influence the Bid/No Bid decision. This approach results in less late-stage solution re-engineering and fewer unpleasant surprises and red faces. A business deciding to No Bid because of a poor solution will maintain its reputation and preserve its bid budget/resources for better opportunities with more viable solutions.



FEELING VALUED?

If the term 'Value Proposition' were summarised outside of the bid world, it might be something like "a concise statement that clearly explains what your organisation does and how it fulfils a certain need."

Place this statement back into the context of the Bid Lifecycle and its value seems to automatically depreciate! As part of the Capture Phase, value proposition development is so much more than the definition given above. It requires time, research, internal collaboration and, most importantly, a client-focused stance.

How can each of these elements be approached to develop something meaningful to the client (that makes them feel valued) while also justifying your pursuit of a bid opportunity? Let's explore.

Time

Sometimes the Capture Phase of the Bid Lifecycle can be very short or even non-existent. So it is vital to give yourself enough time and space to develop your proposition and potentially revisit and revise it. This will ensure it is fit for purpose and provides the right level of value to the client.

Research

It is so important to identify and understand your client's main issues and pain points so you can help solve them (ideally through your product or service!). However, wider research around the client plays an important role in developing that unique value proposition. This can include exploring issues that have affected them in the past and have led to the current situation, and identifying potential risks they may not have recognised yet.

Internal collaboration

Sharing ideas and differing viewpoints can really elevate the eventual value proposition by stress testing what is being proposed. Liaising with different departments in your organisation also allows knowledge and data sharing to facilitate a fuller and more balanced approach. For example, involving your commercial team in the value proposition development process can assist in shaping the cost benefit to the client with carefully devised analysis.

Client-focused

This is probably the most important element. Ultimately, the client needs to feel valued and understand how your solution will address their unique needs while delivering tangible benefits. Your solution will demonstrate this by always bringing the focus back to the client and understanding their challenges, issues and risk factors.



IT'S STRATEGIC! SO YOU BETTER HAVE A STRATEGY!

Don't just answer the RFP questions. Have a plan!

"What's your win strategy?" I recently asked an Account Manager overseeing a \$50M opportunity in the IT sector this question. His answer: "We are going to provide a fully compliant, state-of-the-art, high-quality solution at the lowest possible price point." Aah! He didn't have a strategy.

Generally speaking, strategies are high-level plans of action to achieve a long-term or overall goal. While most opportunities fall into the short-term or mid-term category, they still have a clear aim: winning the deal! So it's about positioning your offer against your competition from the customer's perspective. We need to distinguish between a) the capture strategy (also 'opportunity strategy' or 'win strategy') which involves the overall actions to win the opportunity and b) the proposal strategy, which involves the content plan (aka storyline or storyboard) also aimed at winning the deal.

Bidders should verbalise and/or document their strategies using so-called strategy statements – without writing an epic. The proposal strategy should build on the capture strategy. It should outline how you intend to design your proposal document to implement the capture strategy. The content plan is then the tangible output of the proposal strategy.

Of course this type of strategy process is overkill for many smaller opportunities.

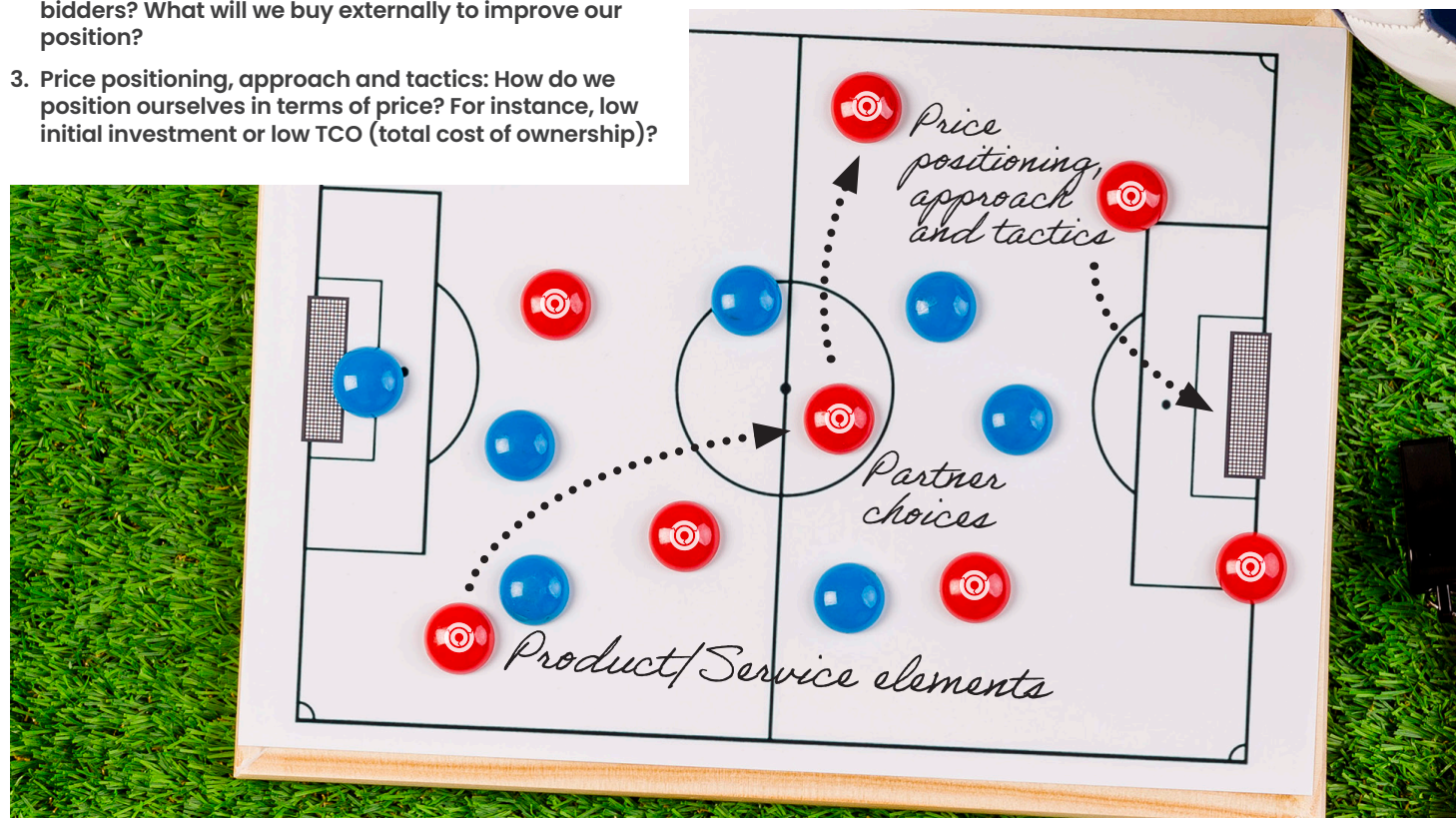
Many bidders struggle to formulate any such strategy. What's so difficult about it? The first challenge for many is gaining sufficient awareness of the competitive landscape. The starting point must be your assessment of your current positioning, typically using a SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis. This depends on your access to competitive intelligence, and therefore is sometimes out of your control.

The second challenge lies in the uncertainty about the type of actions such a strategy should include. We can use the following three dimensions as a simple framework to master this:

- 1. Product/Service elements: What are the key product or service components that we will offer to fulfil the requirements and achieve good positioning (benefits)?**
- 2. Partner choices: Are we bidding as a general contractor, sub-supplier, or in a syndicate with other bidders? What will we buy externally to improve our position?**
- 3. Price positioning, approach and tactics: How do we position ourselves in terms of price? For instance, low initial investment or low TCO (total cost of ownership)?**

Developing your win strategy is about clearly defining the above and developing a communication plan: Which benefit should be communicated to which buying centre member through which channel? Remember: Benefits (not features!) describe the results of your actions on the client's side.

Finally, your distinct plan on how to place those messages in your proposal is the focus of your proposal strategy which results in a content plan. Done!



DEVELOPING A WIN STRATEGY – THE PIVOTAL MOMENT

Developing a compelling, differentiated win strategy is the pivotal moment or event in defining the outcome of a bid. Get it right, and you'll maximise your chances of winning. Get it wrong and you'll lose, potentially damaging your reputation.

Think about your audience

Firstly, never forget that your pitch is being evaluated and scored by people (not a machine, yet), and people are all different. They see things differently, based on their personal and professional perspective.

Conscious and unconscious bias is also a key factor, both positive and negative, and will influence the outcome.

Cicero, the Greek philosopher, summed it up beautifully and concisely when he said, "If you want to persuade me, you must think my thoughts, feel my feelings, and speak my words."

Have that at the forefront of your mind when developing your win strategy.

Considerations

Fundamentally, you need to understand the customer's requirement in great detail, as well as what's driving it, their expected benefits, and their budget. Understanding their appetite for risk is also critical.

Knowing the competition is equally important, as is understanding their relationship with the key customer contacts, their track record as a supplier to the customer, and their likely approach to winning the business.

All the above should have been done during the Capture Phase. Trying to do it after the ITT or RFP arrives is too late.



The win strategy

At a minimum, your win strategy must be compliant, whereby you can prove that you can meet all your potential customers mandatory and optional requirements. But being compliant is not enough. Compliance requirements apply to all potential suppliers, theoretically resulting in a lot of very similar pitches.

To stand a chance of winning you must be at least 'compliant plus', i.e. more than compliant, offering a solution with unique advantages over and above 'just' compliance. To truly differentiate your pitch, you need to explore new, innovative options to the potential customer to distance yourself from the competition.

I used this approach with The Halifax Building Society (as it was then) back in 1997/8, and won a five-year, single source supply and services contract worth >£10m pa. The key to winning this deal was our ability to do what Cicero prescribes. Our win strategy was simple; be compliant, but offer better or cheaper approaches as 'compliant plus'. Being one of four incumbents, we had the insights needed to do much of what they wanted more quickly. We called this third option our 'innovate solution', described in a two-page management summary – which was the reason we won the business according to the feedback received. And that management summary was written BEFORE the proposal writing started!

In summary

Do everything outlined above in one day, in one room, with everyone who has an opinion on the opportunity. Make sure everyone has a voice, and don't let one person dominate the process. Consider facilitation if this sounds challenging. Capture everything in a draft management summary and use this to brief everyone involved in the Proposal Phase. And NEVER forget Cicero, as he's your best friend in all this.



QUALIFICATION: A GAME OF COLOUR

Qualification. Bid or no bid. Go or no go. Bid decision gates. It doesn't matter what you call it – as long as you do it. Diligently, systematically and every time.

But is it really a black-and-white matter or is there room for a few shades of grey? I feel like a lawyer when answering this question but: it depends. This is where the real challenge lies.

Here are a few things I consider as either black-and-white or shades of grey. Black-and-white aspects are material, make or break showstoppers. For example:

- **Commitment against the clock.** Are the right resources fully committed and do they have the available response time to develop a compliant, compelling, and persuasive proposal? Or will the proposal team have to make do with AI and the best effort (i.e. spare time nobody ever has) from SMEs, executives, and other key roles? And do I need to remind you that availability is not a skill?
- **Customer insight.** Do you understand the customer's challenges, industry, objectives, procurement processes and social value well enough to say without a doubt what outcomes they want to achieve with the tender? Or do you think 'seen one, seen them all'?
- **Capability and capacity.** Do you have the required solution knowledge, experience and skills to deliver against the scope of work? If you win it, will you have the capacity to deliver the work? It hardly helps your business to win the project of your dreams only to realise you cannot fulfil it.

It is a bid manager's responsibility to guide their business through these black-and-white aspects to avoid low-win opportunities. But it is also their responsibility to address the shades of grey areas where you don't 100% meet the customer's requirements. For example:

- If you lack ISO 27001 certification when responding to an RFP for an IT services provider, you can emphasise adherence to other security standards like NIST or CIS. Showcase your experience in similar projects and demonstrate understanding of security protocols, risk assessments, and compliance.
- The RFP requires one certified professional with specific qualifications but your team has two members who collectively hold the required certifications. Highlight each member's strengths and relevant qualifications. Emphasise how they collaborate and cross-train, and focus on the benefits such as flexibility, reduced dependency on a single individual, and continuity of service. Their combined strengths create a well-rounded team despite no single team member possessing all the qualifications.

The trick lies in knowing the difference between black-and-white or grey. Remember, your duty as a bid manager is to oversee and coordinate the bidding process, manage a team to prepare proposals, and **win contracts.**



THE BACKBONE OF WINNING

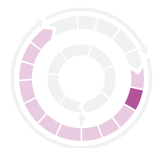
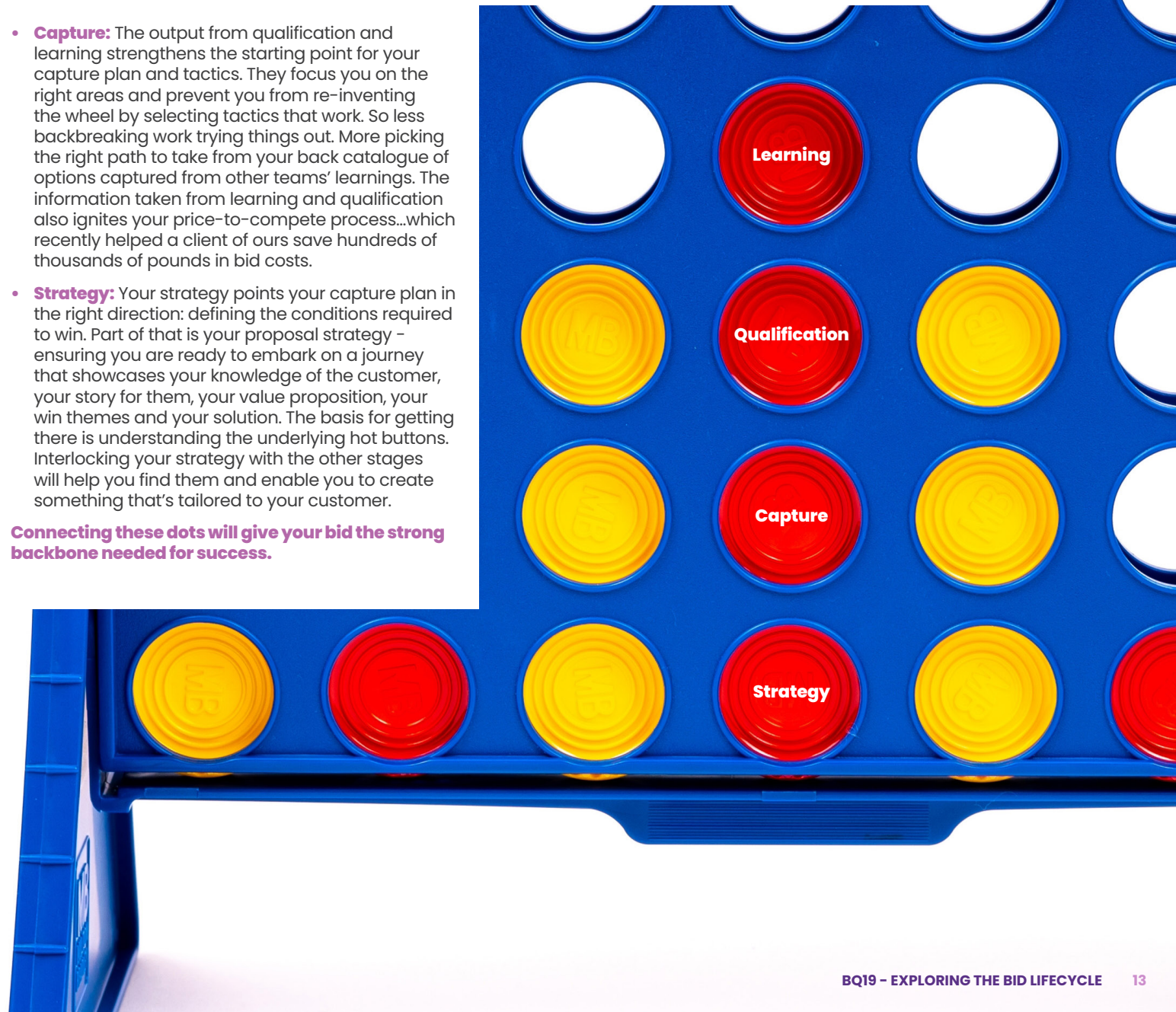
Bidding is a complex and dynamic process requiring a strategic approach and a keen awareness of the factors influencing the outcome.

One of the keys to winning more is to understand the connections between the distinct phases of the Bid Lifecycle, from capturing opportunities to learning from feedback. These phases are like the vertebrae of a backbone: the stronger they are and the better they work together, the more resilient and effective your bid strategy will be. In this article, we will explore the four main influencers on success and how they relate to each other: capture, qualification, strategy, and learning reviews.

- **Learning:** let's start at the end...of previous deals. It's crucial that whatever process you go through, you end up with the reasons behind the result: themes, value proposition, quality/pricing scores versus the competition's performance (where provided) and what key things you did that impacted the result (good and bad). Storing these factors in a structured way creates a goldmine of snippets that will create a stronger connection with the next step: capture. Remember, lessons learned not lessons filed.
- **Qualification:** let's not waste our time here. Let's filter out the 'no chance' deals by qualifying early. Insights from learning are invaluable to keeping your qualification criteria relevant. This is not just a gate process. Qualification should be an on-going activity that assesses your win chances in near real-time, i.e. it becomes active. To do this you need know what makes a winning deal, then you assess (continuously) how far away you are from those winning characteristics. Input from learning can fast-track filling gaps you might have, leaving you to prioritise what needs to be done. Whatever they are, they should find themselves in your capture plan.

- **Capture:** The output from qualification and learning strengthens the starting point for your capture plan and tactics. They focus you on the right areas and prevent you from re-inventing the wheel by selecting tactics that work. So less backbreaking work trying things out. More picking the right path to take from your back catalogue of options captured from other teams' learnings. The information taken from learning and qualification also ignites your price-to-compete process...which recently helped a client of ours save hundreds of thousands of pounds in bid costs.
- **Strategy:** Your strategy points your capture plan in the right direction: defining the conditions required to win. Part of that is your proposal strategy - ensuring you are ready to embark on a journey that showcases your knowledge of the customer, your story for them, your value proposition, your win themes and your solution. The basis for getting there is understanding the underlying hot buttons. Interlocking your strategy with the other stages will help you find them and enable you to create something that's tailored to your customer.

Connecting these dots will give your bid the strong backbone needed for success.



BID TEAMS IN CONCERT:

“No one can whistle a symphony. It takes an orchestra to play it.”

– Halford E. Luccock

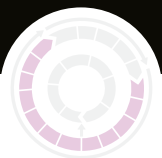
According to the Loopio and APMP 2024 RFP Response Trends and Benchmarks Report¹, bid volumes are increasing, bid turnaround times are reducing, and bid resources are more constrained.

If your organisation doesn't have the budget for additional full-time team members, how can you do more with less, at speed? Here are my top five tips:

- 1. Optimise at the overture:** Determine if you have appropriate bid resources available (i.e. capability AND capacity) as part of your qualification process. If you don't, be realistic about how this will affect your probability of winning. If you do, facilitate a robust handover from opportunity/capture management to bid management, and develop a resource budget. Engage with your leadership team to make sure resources are set up for success (e.g. free up technical Subject Matter Experts' time to work on bids but also introduce bid-related Key Performance Indicators for SMEs to drive accountability).
- 2. Harmonise job titles and roles:** Job titles can differ between companies (and sometimes between business units within the same company). There can also be a mismatch between job titles and role expectations. What do you need for a winning bid? Start with competencies, then build up to identify roles, then specific people.
- 3. Assemble your ensemble:** In addition to core bid roles (the virtuoso bid and proposal managers, proposal writers, bid coordinators and graphic designers), your team may include sales leads, SMEs, legal counsel, pricing lead, reviewers, and sponsors. Create a RACI (Responsible, Accountable, Consulted, Informed) matrix so everyone's clear on what's required of them – no gaps or duplication of effort.
- 4. Arrange strategic alliances:** These could include teaming delivery partners and bid consultants. Understand their capability and capacity, the value they'll bring to the bid, and how your organisation will contract with them. Determine how you'll articulate the benefit of your combined team to the client. Are the partnerships tested and do you have exclusivity? How will bid consultants on-board quickly and collaborate seamlessly with your internal team?
- 5. Compose resources for your resources:** Anticipate what support your team may need. This could range from technology (e.g. collaboration, proposal automation, and generative AI tools) to training (e.g. on bid processes, technology) to guidance (e.g. content plans, reviewer checklists).

¹ RFP report: 2024 Trends & Benchmarks (2024) Loopio. Available at: <https://loopio.com/trends-report/> (Accessed: 30 May 2024).

ALLOCATING RESOURCES FOR WINNING PERFORMANCES



PLANNING FOR PROPOSAL SUCCESS

I'm a proposal professional, not a miracle worker. You can win a bid by crafting a brilliant proposal that creates amazing empathy with the evaluators, demonstrating a fantastic proposition that surpasses their wildest dreams.

But your task of winning the race is SO much harder if others have more momentum and are on the inside track when the RFP lands. You're not going to be the front-runner if the most you know about the client is: "Well, we've read the RFP..."

Here's the deal. I want to sit down with the salesperson as soon as they have an inkling that we may need to write a proposal. And if they don't know it's coming, you possibly shouldn't be bidding, right? A few topics to explore:

1. How are we going to engage the client's decision makers to make sure our proposal is sown onto fertile ground?
2. What competitive intelligence can we gather?
3. How can we influence their requirements and criteria in our favour?

4. Who'll need to be on our proposal team? (Let's engage, brief and inspire them early – rather than begging favours in panic mode.)
5. What are our solution and pricing models going to look like? Even scant information should allow us to start to design our proposition early.
6. What questions are they likely to ask – or, at least, what are some of the building blocks of content we'll need? (I reckon most teams could predict 80% of what's going to be needed before they see the RFP – so why not draft it while we have the benefit of time?)

And I want to make sure our team is posing the right questions in their conversations with the client before the proverbial shutters come down. Here's a top ten list of things they might otherwise forget to ask:

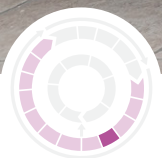
1. What's the real problem you're trying to solve here – or opportunity you're trying to exploit?
2. What benefits do you expect the supplier to deliver?
3. Why might you move away from your current supplier?

4. If I asked you to describe the ideal solution, what would it look like?
5. What do you see as the main risks or challenges for your selected supplier?
6. What budget do you have in place?
7. Do you have any concerns about our ability to successfully deliver this that we'll need to address?
8. Who's evaluating the proposal and approving the decision?
9. What will be their most important evaluation criteria?
10. If you could picture the 'perfect proposal', what would it look like?

It's about focusing the capture plan into the things that will lead to a winning proposal – or, sometimes, getting a grip if no capture plan exists!

The most successful proposal organisations are no longer merely responsive to the RFP. Pre-proposal planning is a core process in their success.

PROJECT PLAN



WELLNESS FOR WINNERS

When you're in the throes of a looming deadline, it's easy to put all your focus on the bid and allow wellness to go out the window. "I'll just get this out of the way and then I'll..(catch up on sleep/get to the gym/eat better)."

But the reality for bid teams is that deadlines and being busy are often constants. And if you also constantly omit self-care, where does that leave you as an individual? Counting the minutes to your holiday, and using the break just to catch up on sleep? If you are constantly depleted, sleep-deprived, sluggish and running on caffeine, you're not bringing the best version of yourself to work – or to any area of your life. And how can you do a good job when you are below par?

When you are super busy, your wellbeing actually becomes more important, not less. And taking care of yourself so you can handle the higher demands is crucial. Consider a sports person – do you think they approach a final with poor food, skipping sleep and hoping a coffee or two will give them the edge? Or do they make the basics like sleep, hydration, nutrition and mindset their highest priority? It's the latter of course. So if you use that as a model, how do you make sure you are taking care of yourself so you can bring your best performance?

An exercise I use with my clients is to get clear on your needs and write them down. Think about what you need to get you to ok every day.

- Sleep
- Hydration
- Nutrition
- Exercise

What else do you need?

- Time with loved ones?
- Time in nature?
- Alone time?

And be really specific. For instance, how much sleep do you need on an individual level to function? Some people may only need six hours, while others may need eight or nine. To be clear, this is the detail behind what you need to get yourself to ok every day. Understanding these needs, and putting plans in place to make sure you meet them, helps make sure you are always operating from a good starting point.

You can also use this approach with your bid teams. Building self-care into the bid planning stages will help everyone be very clear on what they need to get them to ok every day. That way, the whole team can function optimally and ultimately be in the best position to make the bid a success. And maybe even have enough energy to enjoy the process too!



MIND




BODY




YOU
WINNER

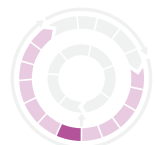



SPIRIT




SOUL

“ WHEN YOU ARE SUPER BUSY, YOUR WELLBEING ACTUALLY BECOMES MORE IMPORTANT, NOT LESS. AND TAKING CARE OF YOURSELF SO YOU CAN HANDLE THE HIGHER DEMANDS IS CRUCIAL. ”



IS THERE STILL A PLACE FOR BID ROOMS?

A lot of things were different when I started out as a bid writer over 25 years ago. Notably, in the land before Skype, Zoom, and Teams, every bid team interaction was face-to-face. Big campaigns would usually culminate in a bid-bunker session, with team members hauling up in a hotel for a week, working late into the night, day after day, to get the bid over the line. In retrospect it was somewhat antisocial, and about as grim of an example of maintaining work/life balance as you might conceive. But it wasn't all bad. These windowless bid writing marathons were invariably driven not just by coffee, but by a collegiate desire to win, alchemising lead-like half-ideas into bid writing gold. In a strange and unconventional way, they were a lot of fun.

Nowadays, in-person bid meetings are on the brink of extinction, replaced by rapid-fire daily check in videocalls from the comfort of your living room/home office. So, it was something of a novelty in late 2023 when a client asked, nay insisted, on using a bid room for its campaign. I was, at first, a little reticent. It was quite a trek for me to get to the location. I wondered if it was all necessary. (If I'm honest, it wasn't to a degree.) A lot of the ground could have been just as productively covered over Teams. But (with more than a hint of nostalgia for the good old days) when it worked, it worked really well.

There was a lot to be said for having subject matter experts and bid writers in the same room, collectively reviewing a draft answer line-by-line on a large TV screen, and scribbling ideas on white boards. The process triggered fresh perspectives and unearthed forgotten examples, and elicited compelling alternative datasets in a manner that would not have been nearly as forthcoming had it all been online. Placeholders were readily filled, sentences were sharpened, wordiness was trimmed, and presentational formats were tested. People weren't just in the room, but they were genuinely present. People who were, in some cases, strangers at the start of the process felt like they were part of a team by the end.

The bid was finally submitted, and I wearily made the long train journey home. Part of me was glad to see the back of it all, and to sleep in my own bed again. But part of me was equally a little energised. It may be more expensive and time-consuming to use in-person bid rooms these days, but there is an upside. At a time when people are increasingly looking at new, high-tech solutions to improve their bids, there might be more to be said for revisiting the old school too.

“ **NOWADAYS, IN-PERSON BID MEETINGS ARE ON THE BRINK OF EXTINCTION, REPLACED BY RAPID-FIRE DAILY CHECK IN VIDEOCALLS FROM THE COMFORT OF YOUR LIVING ROOM/HOME OFFICE.** ”



ASYNC FOR THE WIN

If there's one thing that has helped me drastically improve Proposal Phase management, it is the implementation of asynchronous processes. Before sharing how I do it, let me share why.

First, management effort is an overhead. The objective of the Proposal Phase is to produce a proposal to win a contract, not to manage one.

Second, all real-time communications, particularly meetings, represent the costliest actions a professional can undertake without approval.

Let's take meetings, for example. The cost of a meeting is the duration of the meeting X the average hourly cost of the professionals attending X the number of professionals attending. The higher the ranks invited and the longer the meeting, the higher the cost.

And those are only the easy-to-measure costs. Then you have hidden costs such as the opportunity cost of attending, focus disruption cost (huge for technical experts who need big blocks of uninterrupted thinking time), pre/post-meeting actions, morale, etc.

If you do the numbers, you'll realise meetings are almost always in the hundreds of dollars range (many times in the thousands) per meeting. However, teams are having them as if meetings are free—try to spend that much on tools and training, and let me know what your CFO thinks!

How do you minimise such an expensive overhead? You figure out how to manage proposals as if real-time communications weren't possible. For some remote teams working across time zones, that's indeed the case – but even if you have all your team in the same office, imagine you can't talk, call, or meet. Then, do the following exercise:

- 1. Get a project management app that centralises your bid management. I like to use those that combine different views on top of the same data (table, Kanban, calendar, etc) and have handy functionalities like shared drives, messaging, reminders, status tracking, etc.**
- 2. Break down your bid preparation process into steps you can analyse regarding inputs/outputs. Drawing a flow diagram helps a lot.**
- 3. Substitute every real-time communication with asynchronous alternatives in the centralised bid management plan of step 1.**

After many years of managing proposals this way, I've found that almost everything can be an async process. This not only helps reduce costs but also improves traceability and accountability, making managing bids much easier.

There is only one exception. One type of real-time communication I haven't found a way to do asynchronously is problem-solving (brainstorming). I still recommend having meetings for these, but ensure the problem you're trying to solve is worth the investment.

Just a closing note: forcing your SMEs to attend a meeting because there's no other way for you to get their input doesn't make meetings 'good'. It's an expensive tactic we all have used at some point, and it signals a deeper problem than just bid management.



KICK-OFF: A MISNOMER?

Let's get this straight up front.

In the bid world, a kick-off doesn't start the proceedings. It doesn't happen on the day the Invitation to Tender (ITT) or Request for Proposal (RFP) arrives. And a kick-off meeting isn't:

- **An ITT/RFP assessment meeting**
- **A qualification meeting**
- **A go/no-go decision point**
- **A win strategy review**
- **A solution design session**
- **A competitor analysis**
- **A resourcing meeting**
- **A bid budget approval meeting**

In fact, it's not a review, discussion or decision session of any sort. All that gets done elsewhere, before the kick-off.

So what is a kick-off meeting?

It's a briefing meeting. Simple. And it happens anytime from 10% to 20% of the way through your response timeline. To put this in context, let's explore an example journey from ITT/RFP arrival to kick-off from the bid manager's perspective.

When an ITT/RFP arrives, you take ownership. You work with a core team of people – one empowered representative from each part of your business. For example, a commercial lead, a technical lead and a delivery lead. Together, you analyse the tender documents to identify risks and showstoppers, draft a high-level solution and check the win strategy. Optionally, you set a provisional date for a kick-off.

Next, you get approval to proceed (or not!), along with a bid budget and any additional resources necessary to complete solutioneering and develop the proposal. Only after a 'go' decision do you set or confirm the kick-off date. But there's still work to do.

You now progress the proposal strategy to fine-tune the winning story, build a plan, design the response structure (with content plans where appropriate) and prepare the agenda and artefacts for kick-off.

You invite everyone who will be involved in the proposal process including management sponsor(s), proposal

contributors, reviewers and approvers. You may invite third parties or run a separate kick-off for them. You pull together a presentation pack covering the opportunity and the win strategy with the complete plan of what needs to be done, when, by whom, how and where.

You run the meeting – no more than two hours – possibly splitting it into two halves with the first half to set the context and a high-level plan, and the second half a detailed explanation of the next steps for contributors. You use the session to establish yourself as a competent and authoritative leader

who will drive the process from now until proposal submission. You make sure everyone understands their role, responsibilities and timescales and the key messages.

There you have it.

Preparing and running a well-structured kick-off meeting helps to set the tone for managing the team over the response period. Professionalism, discipline and control from the early stages will motivate and inform everyone and increase your chances of producing a winning proposal on time.



“ WHILE THE OBJECTIVES OF KICK-OFF MEETINGS IN PROPOSALS AND FILM PRODUCTION DIFFER, CLEAR VISION, DETAILED PLANNING, EFFICIENT RESOURCE MANAGEMENT, PROACTIVE RISK MITIGATION, AND EFFECTIVE COMMUNICATION ARE UNIVERSALLY BENEFICIAL. ”

WHAT DO FILMS HAVE TO DO WITH PROPOSAL KICK OFF MEETINGS?

VISION

PLANNING

RESOURCES

RISK

COMMUNICATION

DATE SCENE

There are striking parallels between film production and business proposal kick-off meetings. Both are pivotal in their respective domains, setting the stage for successful outcomes. In films, pre-production meetings harmonise the creative and logistical aspects, paving the way for a smooth shoot. Similarly, proposal kick-off meetings are the starting point for crafting a winning proposal. By drawing on the best practices from film production, we can glean valuable insights to enhance our kick-off meetings.

Vision

One of the key lessons we can learn from film production is the power of a unified vision. The director and producer are crucial in establishing a clear artistic direction and goals. This shared vision serves as a guiding light for the entire team. Similarly, in proposal kick-off meetings, the Capture and Bid Manager's role is to understand the client's needs and articulate the proposal objectives. This aligns the team and sets the stage for a successful bid. **TIP:** Having a sponsor in the meeting can help, but the focus should always be understanding how to win the tender.

Planning

Film pre-production meetings involve detailed discussions on script, shot lists, scheduling and roles, reducing ambiguities and overlap. In proposal kick-off meetings, this means defining each team member's role, setting specific tasks, and establishing deadlines. APMP recommends that kick-off meetings occur 15% into the bid response duration. **TIP:** Don't hold the kick-off meeting until you have done all the necessary preparations.

Resources

Effective resource management in filmmaking involves budget, equipment, and personnel planning. For proposal meetings, identify and allocate resources beforehand to prevent delays. Are key Subject Matter Experts (SMEs) going on holiday or engaged? **TIP:** Ensure writing tasks are correctly assigned, and offer to follow up with SMEs individually outside the meeting.

Risk

Films often have contingency plans for issues like weather disruptions or cast changes. Similarly, proposal kick-off meetings should incorporate risk management strategies to address potential issues before they escalate. **TIP:** Involve your legal team beforehand to identify and mitigate risks.

Communication

Film directors and producers communicate continuously through daily call sheets and production meetings to keep everyone informed. Similarly, establishing regular check-ins and updates keeps the team informed and engaged. **TIP:** The kick-off meeting is only the start. Hold daily status calls and use dedicated communication channels to update the team.

Summary

While the objectives of kick-off meetings in proposals and film production differ, clear vision, detailed planning, efficient resource management, proactive risk mitigation, and effective communication are universally beneficial. Adopting these best practices from the film industry can enhance the efficiency and success of proposal development processes. You may not get the coveted Oscar statuette to display in your toilet or become the next Martin Scorsese, but you will certainly increase the chances of winning your tender.



FOUNDATIONAL ANSWER PLANNING

Unpicking the client documents to create a compliant response from the get-go

It is common to start the storyboarding process with just a blank piece of paper. But to truly empower our subject matter experts, we must go beyond simply supplying them with question headings. By enriching the initial stages with more structured guidance, we enable experts to concentrate on crafting solutions rather than getting bogged down in 'evidence-first' thinking. 'Building bottom up' means we avoid cramming early drafts and storyboards with past content and evidence. The scope and works information is key.

The basics

To ensure compliance with technical requirements in every response, it's essential to conduct a thorough analysis with intelligent challenge of the necessary documentation. To do this, we need to read between the lines and unpick the scope documents using experience and expertise in the subject matter. Once this is done, we align this to the questions and evaluation process. Traditionally, this process involves a meticulous 'document shred', where details are carefully examined and extracted. This in effect creates a 'menu' of credible, compliant content that will be the bones of your response. We can do this manually or with the help of a search bar or two, but there are also several intelligent tools and techniques available now that can streamline this process.

The hierarchy of client needs

If you've read my articles before, you'll know that I live by the mantra 'make them feel safe, make them feel excited'. To make a buyer feel safe, it's crucial we provide confidence in the seller's capability and capacity to deliver their defined outcome. When applying this hierarchy of needs to the answer development, I adopt a tried and tested, three-tiered support approach for my teams:

Who: Defining Roles and Accountabilities

The first tier, 'Who', focuses on the individuals or teams responsible for managing and executing the project. It's important here to think laterally about a team's experience, behaviours and background with the client.

What/How: Meeting Client Specifications Holistically

The second tier combines 'What' and 'How', addressing the specifics the client is looking for and how these will be managed holistically. It starts with clearly stated project objectives and a detailed scope of work outlining tasks, deliverables, and services. Technical requirements must be met through a robust project management methodology (such as Agile or Waterfall) complemented by a comprehensive work plan.

Where: Insights from Previous Implementations

The third tier, 'Where', draws on our previous implementations and the insights gained from those experiences. Showcasing examples of similar successful projects, detailed case studies, and client testimonials provides tangible evidence of our reliability and effectiveness.

Why: The Importance to the Buyer

For a bonus tier, we consistently challenge ourselves with 'Why' – understanding why each aspect of our approach is critical to the buyer. This involves explaining how our strategy meets the client's needs but also offers additional benefits and opportunities for innovation. We are demonstrating alignment with the client's broader business objectives and our understanding of their motivators.

Innovate, don't just iterate

Foundational answer planning isn't just a methodology. It's a paradigm shift. It can transform poor SME engagement and fruitless storyboarding, and pivot the focus from regurgitating evidence to crafting bespoke solutions. While 'boilerplate' approaches may have been the norm, this method empowers teams to break free from repetition, delivering truly tailored responses that resonate with clients and drive superior results.



BY ENRICHING THE INITIAL STAGES WITH MORE STRUCTURED GUIDANCE, WE ENABLE EXPERTS TO CONCENTRATE ON CRAFTING SOLUTIONS



CURATING COMMERCIAL CLARIFICATIONS

Successful tender submissions require four key content elements:

1. **A solution** to the customer's requirements to resolve a need.
2. **General information** about your company to assess fit and suitability.
3. **A price**, with or without added value, to determine affordability.
4. **Commercial terms** and conditions to mitigate overall contract risk.

Proposal professionals often focus on the first two elements, gathering content from subject matter experts and presenting it effectively. They act as interpreters, bridging the gap between the company's content and the customer's needs.

However, the second two elements – price and commercial terms – are frequently overlooked. Many proposal professionals claim they lack expertise or influence, or that these aspects are not their responsibility. Yet price and commercial terms are also crucial content and are often critical for contract success.

A Typical Approach to Handling Commercial Clarifications

A good tender submission aims to make it easy for the buyer to select

an organisation. However, issues can arise when it comes to contractual information. For example, when a draft contract is included with a customer request and clarifications are invited, commercial departments or lawyers often provide extensive lists of requested changes. These lists are usually included in the submission 'as is', despite their complexity.

There are generally two approaches taken by proposal professionals:

1. Include the information exactly as provided, even if lengthy and difficult to understand.
2. Include a vague statement like, "We have reviewed the contract terms and conditions and wish to discuss these prior to any contract award."

Both approaches can hinder shortlisting and selection.

A Better Approach to Handling Commercial Clarifications

A more effective approach involves classifying and presenting each suggested contract change into one of four categories. This method still provides the necessary information from the commercial department but presents it in a more customer-focused way. This approach reduces perceived resistance from the buyer, better facilitating the path from shortlist to winner.

1. SOLUTION
2. GENERAL INFORMATION
3. PRICE
4. COMMERCIAL TERMS

“PROPOSAL PROFESSIONALS OFTEN FOCUS ON THE FIRST TWO ELEMENTS... HOWEVER, THE SECOND TWO ELEMENTS ARE FREQUENTLY OVERLOOKED”

Category	Type	Comment	Example
1	Not negotiable	A deal breaker, but there should only ever be a few of these.	Consequential loss is unlimited.
2	Negotiable	Significant enough not to ignore but negotiable. Often comes with a pricing implication.	A certain type of insurance is asked for. You don't have it, and you don't believe it is required, but you can get it (for a cost).
3	Clarification	A better interpretation so misunderstanding is reduced.	Rather than 'Reports are due every Monday' suggest 'Reports are due on the first day of the working week'.
4	Correction	Obvious mistakes that should be accepted by the drafter without question.	'Clause 5.2' should read 'Clause 5.3'.

So next time, don't just ignore an exhaustive list of commercial clarifications. Work to understand them and categorise the key objections. The submission will have a better chance of success, and you will enhance your value as a proposal professional.



BID WRITING: UNDERESTIMATE IT AT YOUR PERIL

PIPPA BIRCH

A message to those that don't write: Never underestimate the importance of great bid writing – it can win or lose a bid.

Writing must be persuasive, providing evaluators with confidence that you are the right people to deliver the service or product. Writing must provide the wow factor with a customer focus, explaining the benefits and differentiators of the offer. It must be accurate and compliant, following given rules.

Clear, simple writing is best. Imagine writing for a 13-year-old – plainly, but intelligently, demonstrating an understanding of complex processes. This allows every evaluator to understand your message

Planning is everything

We can't write responses without a plan. How will I know if I've answered the exam question? How will I know I've ticked off the evaluation criteria? How do I get my SMEs on board without a clear plan of attack?

Plan your answer by meticulously working out response structure and contents, and setting out headings, evaluation criteria, and weightings. The storyboard then delves deeper, filling in the gaps. It should set out approach, benefits, added value and evidence, and identify graphic requirements, actions, and responsibilities. When it comes to writing, you will find the words flow easily because you know the direction they need to go in and have the information required to tell the story.

Not all words are necessary

Quite often we write beautifully persuasive text to cover all the points in a storyboard, only to find we have gone way over the word count. Here are some tips for getting it down:

- Only ever use the active voice. It is more direct and uses fewer words.
- Make sure the words you do use add meaning. If they don't, get rid.
- Remove 'empty' words that don't bring meaning to what you are writing – on the contract, during the contract, that, the, which, etc
- Remove transitions (e.g. furthermore, also), conjunctions (e.g. and, but, or) and running starts (e.g. it is, the fact that). Shorter sentences are punchier anyway, and easier to read
- Read, read, and reread – does it make sense? Is each word meaningful? If you can remove half a sentence, would it still make sense? If you can remove words without losing meaning, delete them.

Continual learning is compulsory

As bid writers, we must write in a certain way and continually improve to make our writing richer. Writing a dissertation at university requires a different style to bid writing –

understanding the difference makes you a better bid writer. Hone your skills. Read lots of things in different genres – fiction and non-fiction, newspapers, cookery books, online articles, comics – anything that uses words to persuade. Practise writing in different ways – write a story, social media posts, keep a journal, write your recipes down, dabble in poetry.

A message to those that do write: Love what you do. You have an incredible skill.



CHAIN, KEEP US TOGETHER

HOLGER GARDEN

That line from the chorus of Fleetwood Mac’s *The Chain* reminds me of a procuring customer’s remark: “We have to pull the market for solutions that pull us in the right direction.”

I like the notion of the bid process being a value chain keeping the team connected to the customer while also uniting the process steps.

There’s growing recognition in civil engineering of the benefits from adopting a systems approach to infrastructure development: the SAID model. It tasks infrastructure owners and operators to translate their requirements into outcomes around which their assets and networks are to be designed, built and operated as systems instead of separate parts.

With a similar mindset of unity, I visualise a bid as integrated steps instead of silo activities. Imagine the process as an elastic value chain leading to the procuring customer at the end. The customer, as procurement driver, needs the market to help direct its motive power on a course of greatest value to its business. With the work-winning function at the other end, the healthy tension in the value chain guides the customer in response to requirements. The tension keeps bid steps individually and collectively activated. If a step loses elasticity, it slackens to below full potential and the chain sags, so we risk a competitor’s value chain overpowering us.

Take the Capture Phase as an example. Confident messaging of what matters most to the customer starts with understanding the customer analysis, which influences solution development and the proposal strategy. If the Capture Phase slackens, nuances of the customer’s pain points – what we might call reading between the lines – aren’t transmitted along the value chain to the solution and proposal strategies. Both are essential links for writers to demonstrate the bidder’s understanding of customer pain points.

A building refurbishment bid I once led was ostensibly about corrosion remediation but the end user’s driving pain was mortgageability for redevelopment. Knowing this unwritten behind-the-scenes requirement enabled us to propose alternative options addressing funders’ priorities of investment start date and returns timescale. The Capture Phase influenced customer and end user perceptions before ITT, placing us in a well-informed position for writing even before tender launch.

At the writing link of the chain, we must demonstrate deep understanding simply and efficiently, making best use of page collateral. The value chain transmits understanding better when under tension, each process step communicating effectively with its predecessors and successors. Writers’ communications to download knowledge from subject matter experts and business development/customer account managers are essential in answer planning and response drafting. The goal is always to create customer-centric messages of pain points and features and benefits, avoiding ‘all about us’ own-brand proposals.

To paraphrase Fleetwood Mac, let the value chain keep us together in this mission.

“ THE VALUE CHAIN TRANSMITS UNDERSTANDING BETTER WHEN UNDER TENSION, EACH PROCESS STEP COMMUNICATING EFFECTIVELY WITH ITS PREDECESSORS AND SUCCESSORS. ”



TURNING BREAD AND BUTTER INTO PUDDING

Kick-off meeting – check! Remit understood, win themes in place – everyone is bubbling as they discuss how the solution will answer the client’s questions and solve the actual problem. Timeline set, questions allocated – it’s ready, steady, go as everyone leaves the room. We’re in the Proposal Phase of the Bid Lifecycle and this is where the magic happens – blank paper becomes words that captivate, motivate and take the reader on a journey to decision.

Each opportunity is unique with its own challenges and nuances – this is where our internal challenge starts. How to create those compelling responses? We need the basics that underpin our offering, which we can then refine and perfect. Here’s how the content library fills that need.

Imagine a chef who has been commissioned to create a specific dish – they’ll need a defined set of ingredients and method to create it. Those ingredients (content) are found in their pantry (content library) and then combined to make something wonderful. If they find a better ingredient source or discover an item can be replaced with something else that improves the dish, they will use it, make a note and update their pantry (curation).

Each organisation (chef) provides a specific product or service (dish). The end product is always the same in name (beef casserole/pizza) but what is used to flavour and garnish the dish to meet each client’s need (taste) is what’s unique.

Your content library houses the basic version of everything about your organisation and how its services are provided. This is your pantry. You need a well-stocked pantry, preferably with the best quality ingredients or you’ll be off to the shops every single time you start something new (impacting your result). If there isn’t a storyboard/plan (recipe/shopping list), you’ll be back and forth throughout the preparation time (very inefficient and time consuming!). You end up buying whatever’s left in the shop (poor quality information or not enough) and end up with a barely passable dish!

A good content library ensures you have the basics needed to start drafting a response. You WILL need to refine and tweak what’s there to meet requirements

(there’s a problem elsewhere if you’re not doing that). Your source MUST be curated to have the best basic content available. There should be one or two (maybe three) quality items to choose from (pantries don’t house fifteen types of flour – only the best ones). Once the base is in place, use new information, win themes and other information unique to this opportunity (flavouring, garnishes) to enhance and create a bespoke solution (dish). It’s like turning a basic casserole into something that knocks their socks off because you understand the flavours they’ll like and want.

Without good basics there’s nothing to build on. Refine your source, add to it, improve it and keep it well stocked and you’ll always create award-winning responses!

*PS: All technological advances (kitchen utensils) need a curated library (ingredients) to do their job to the best of their ability



PROJECT REFERENCES AND RESUMES DO NOT WRITE THEMSELVES

ANDERS DYRHOLM

Nine out of ten bid managers I speak with express frustration over the lack of high-quality resumes and references when entering a bid process. The issue with SMEs is well-known and has been described several times, including in Bidding Quarterly.

When it comes to resumes and references, most bid organisations face three primary challenges:

1. **Unwillingness:** Employees and project managers who hesitate to take responsibility for updating resumes and project references.
2. **Poor quality:** The material provided is often of low quality once it is finally completed.
3. **Structure and timing:** Even when completed, these updates are frequently delivered just hours before the deadline.

The good news: there are things you can do to resolve these issues.

Overcoming Unwillingness

I often remark people typically update their resumes only when they are searching for a new job. Luckily, this does not mean we can't entice people to do so. But it does mean the improvement of a resume needs to be an assigned task within their work schedule. Many organisations mistakenly assume employees will handle this on their own time—they won't.

The same principle applies to project managers and the creation of project references. Without a defined task and a place to track the time used, this task will always receive the lowest possible priority.

Where does this leave us? At senior management level.

The Role of Senior Management

For anything to happen in a company, it must be someone's job. The list of potential tasks is nearly endless. It's up to management to prioritise what people should focus on.

Senior management must recognise the importance of the bidding department receiving the right references and resumes at the right time and of the right quality. It is the responsibility of the proposal professionals within the organisation to communicate the consequences of inadequate resumes and references to management.

Creating a Structured Process

I often encounter organisations that believe high-quality references and resumes are a given. They assume everyone understands their importance but fail to establish processes to ensure they are produced and maintained.

For a smoother bidding process with less stress before the deadline, you must create a structure where resumes and references are regularly updated in 'peace time' rather than amidst the chaos of proposal deadlines.

By establishing clear responsibilities and integrating these tasks into regular workflows, organisations can improve the quality and punctuality of their bid submissions and ultimately enhance their chances of success.



NAVIGATING WORDY WATERS

Summers in south Florida where I grew up were hot and humid, and always included a trip to Everglades National Park. It is generally assumed the Everglades is a giant swamp. It's not. Technically it is a very slow-moving shallow river requiring careful, step-by-step navigation. Leave a step out and you may find yourself adrift. Razor-sharp sawgrass or alligators anyone?

The Bid Lifecycle also requires step-by-step navigation where a missed phase may leave you adrift.

Bid plans are usually mapped out with enthusiasm at the start of a project. But when obstacles present themselves, we start looking for phases we can drop; steps we can leave out. In my experience, the Proposal Review phase is one of the first to be thrown overboard because "we've run out of time".

To stick with the boating metaphor, every captain wants a skilled crewmember at every phase of the voyage. Each person has a role to play (some have more than one) in steering the proposal through the rough currents of the tendering period to the smooth waters of tender submission.

In my opinion, the Proposal Review phase is a lifejacket, with an independent* proposal reviewer doing up the straps.

What attributes should your proposal reviewer have? In short, you want someone with demonstrable skills who will be a critical friend.

More specifically, you want someone who will:

- **Check your spelling, punctuation and grammar**
- **Assess your response against the tender questions**
- **Highlight gaps in methodology or missing evidence**
- **Stop you waffling about things the customer hasn't asked**
- **Edit to ensure your message is clear and concise**
- **Review your submission objectively from an evaluator's perspective**

The Proposal Review phase is not designed to make the bid team's life hard. It is designed to make the evaluator's job easy. Evaluators don't want to waste time endlessly navigating murky waters in search of a meaningful catch. They want comprehensive answers in the fewest possible words (whether limits are stipulated or not). They want to quickly assess whether your company will be an exceptional partner who will focus on their needs and deliver what you promise.

A good proposal reviewer will help you demonstrate exactly that.

So don't be tempted to jettison the Proposal Review phase from your bid plans. Or you may end up as gator food while a competitor navigates away with your customer.

***Independent* as in external (my preference, of course!) or internal but **not** part of the bid team.*



“ SO DON'T BE TEMPTED TO JETTISON THE PROPOSAL REVIEW PHASE FROM YOUR BID PLANS. OR YOU MAY END UP AS GATOR FOOD. ”



KAT WYON

RESPECTING REVIEWS – 5 TOP TIPS FOR SUCCESS



Reviews, eh? I've certainly seen a few over the years.

When I think back to my first, it seems like ages ago. It is, of course - I've been in bids for yonks! Since I started, technology has almost completely changed the way we go about reviews. What hasn't changed is how important they are. We're all aware of that. We should be reviewing regularly throughout the bid and proposal cycle - not just frantically at the end. (Hands up if the latter sounds like you. Don't worry, I'll put mine up.) What we're probably all guilty of is not giving our reviewers enough time or direction. So, here are the five things I like to get right when I'm reviewing.

Well...before I do that let me just take a walk down memory lane.

There used to be this thing in our office called paper. And there was a lot of it. All the time. If the thing I was reviewing wasn't a hard copy, I'd print it out anyway! We all did. Then out came the highlighters and on went the teacher's hat and bish-bash-bosh went the dodgy grammar and spelling (or what I insisted was dodgy - not everyone agreed). Then off went my corrections down the line where they were corrected by someone else, whose comments were in turn commented on and so on until purgatory.

Then it was Word and tracked changes. No, don't print it out, just add your comments. And off it pinged around the company, with the last word usually going to the person who jumped on it three hours before the

deadline. But the funny thing is, even now, when we're doing it all online, it can still all be a terrible, confusing mess. Why? Because it's not what you use but how you use it. Nothing is ever efficient and effective unless you plan for it. That means giving direction and allowing time.

Which brings me back to my five things to do when asked to review:

1. **Ask what is expected of you. It might be spelling and grammar or to check the question is answered fully. Maybe fluency and tone and that it hangs together. Perhaps something around the scoring criteria or a focus on a particular section. Be specific.**
2. **Make sure the executive summary is compelling.**
3. **Ask HOW they want your comments (in other words, where). Within the document with tracked changes? It's important to set guidelines.**
4. **Be constructive with criticism. "Yuck" isn't nice or helpful.**
5. **Ask how much time is available and set expectations early.**

Finally, a good review takes time and concentration. Don't squeeze it in. Give it the respect it needs. And review as many times as you can before it gets to the Final Reviewer (and try and make that person someone who's never seen it before).

Right, let me review what I just wrote...



A TALE OF EPIC PRODUCTION

In the world of bidding, excitement often builds around strategy and the thrill of new opportunities. Yet the crucial production and delivery stages are frequently underestimated.

Why early planning is non-negotiable

The central importance of production and delivery must be recognised from the start, regardless of the submission format.

We recently assisted a client with one of the largest tenders South Africa has seen, requiring a truckload of physical submissions. Picture working with three new teams from diverse cultures and countries on an impossibly tight deadline. The complexity and pressure skyrocketed.

Crafting a detailed production plan was imperative, from lockable bid boxes on wheels to preparing for the unforeseen with backup responses and secure delivery. Not to mention orchestrating the logistics for the avalanche of paperwork.

Through this labyrinth, we found ways to save precious time:

- **Plan and plan again:** Excess resources are better than too few. Prepare well with the right people, tools, and technology upfront.
- **Smart structuring:** Starting early with flexibility allows for later stress-free adjustments.
- **Content libraries:** Availability of standard content cuts down time spent searching. Get your standard content out of the way early.

Yet for all the planning, the inevitable hiccups (from late content to malfunctioning printers) remind us to stay nimble. Regular catchups can be your North Star, guiding the project home.

Humour and harmony in the face of chaos

Maintaining a serene demeanour and a ready smile goes a long way. It's about rallying everyone to cross the finish line. In this case endless nights were part of the journey (though they shouldn't be), and delays can sneak up, often from the most unexpected places.

Our recent adventure wasn't just about submitting a tender; it involved strategically assessing our competition and learning to be more vigilant. From the trust we place in who will deliver the submission to proof of receipt, we should keep everything close at hand.

The rewarding finish

Despite the adrenaline and stressors, witnessing your collective effort materialise is profoundly rewarding. The bid process, culminating in production and delivery, is a testament to teamwork and flexible planning.

We had a printer we fondly called "Optimus Prime" – but "Bob Marley" was more appropriate during crunch time, due to its tendency for jamming.

Which reinforces a critical lesson:

Production isn't an afterthought. By weaving it into the lifecycle early, you mitigate last-minute disasters. With all its intricacies, the process deserves respect and careful orchestration to ensure your bid is submitted on time and stands out. So, as we navigate through each phase, let's commit to enduring and thriving, one bid at a time.

**I used AI for summarisation, ideation and structure, and grammar review, but the final content, edits, and personal touches are all mine based on my experience. AI was just a tool to help me be more efficient and creative.*



EMBRACE THE FACE-TO-FACE

Although the bid presentation stage can be managed through an online video platform, the fundamental feature of this stage is that it is face-to-face. While in-person interactions may have already taken place by some individuals on both sides, the opportunity to get time with decision makers and influencers can be a first for many.

Face-to-face interaction is a catalyst for speeding up confidence, building trust and establishing a bond with someone. Research has shown that in a typical 10-minute conversation we can give away up to 150 micro-behaviours, which can be positive or negative. These micro-affirmations through eye contact, open body language, building on what we hear and being interested reinforce our intent and, importantly, personal credibility.

Each attendee in the bid team may naturally feel increased pressure as the team progresses from ITT to presentation. They don't want to let the team down. As such, three things can happen. First, each presenter can become far too focused on their own part of the agenda. Second, scripts, words and slides (rather than rehearsal) occupy the preparation time. Third, we become besotted with the presentation agenda rather than the opportunity to influence the audience.

Remember the overall message

An executive summary at the beginning of most bids emphasises the 'why'. Often on one page, we articulate the solution's strengths and impact in a clear and convincing way. It's important to stay connected to those messages, irrespective of the topics on the presentation agenda. Reiterate and reinforce those messages at every opportunity. Also demonstrate cohesion with your colleagues – not just with your presentation item. Positively referencing each other's content and capabilities naturally positions us in an attractive light to others.

Remember how we communicate

A study by Mehrabian over 50 years ago found that 55% of the impact of our communication came from body language, 38% from the tone of voice, and just 7% from the words themselves. The reality is that our words carry less impact. This is a danger with a time-limited presentation. We tend to concentrate on all the points we want to make as a person and team member, rather than the impact we want to have. When preparing people, it's important to storyboard from the top down in terms of how you want the audience to feel rather than cramming in the detail.

What are the key messages you want to leave them with? It's also key to work with the presenters to capitalise more on positive body language and tone techniques. People can take on a different persona when presenting which can be inhibiting and uncomfortable for the audience.

Remember what the session is about

The word 'presentation' can overshadow the intention of the session and what the audience wants to get out of it. Often a presentation is simply used to apply an element of consistent structure when seeing a number of bidders. In the same way a bid response document will cover questions and/or criteria written by all bidders, a face-to-face session has to have a consistent feel to it for evaluators to make comparisons. The most productive sessions will be interactive, making the audience feel engaged, listened to and understood. All bidders are likely to invite questions throughout the presentation but being able to encourage and elicit engagement takes much more planning and confidence. In reality, it pays to be interested rather than interesting. Being interested gets people to open up and paves the way to an authentic, longer-term connection.



CLARIFICATION ALARM BELLS

How to deal with a clarification question from the client after bid submission

Blissful Ignorance

It was late on a dreary Friday afternoon, the sort that makes one contemplate the meaning of existence. We were snug in the Head of Sales's office. It had been a hard week. There we were, nursing cups of machine coffee that bore an uncanny resemblance to over-steeped tea, nattering about tenders and jealously feigning enthusiasm for his imminent skiing holiday.

We were interrupted by a rap on the door. Without waiting, a junior member of the sales team came in. He was brandishing an email printout as if it were burning his fingers. "Did you see this, Boss?" he said and handed over an email printout. The Head of Sales skim-read the email. "Just give this one to Eileen. She is the sales lead and tell her to get the response in before she goes home", he instructed. "Tell her I trust her to reread the bid and make up any bits

she does not know." With that, we carried on chatting until leaving time, oblivious to what was coming.

A few days after that, we got the letter from the client telling us we had come second!

Of course, this client response would have to be related to that strategically important, must-win bid we submitted a couple of weeks before. Everyone was relying upon on this opportunity being won. After all, the vibes we had from the client until this point were that we should be clear winners. We knew we had an excellent solution and a very competitive price. How could it have got away from us?

Realisation

What we had overlooked was that the simple clarification email was giving us a final chance to come top.

We had not heard the alarm bells ringing. Eileen had done what she had been asked. She had simply pinched a few lines from the bid, spruced them up a bit and dispatched the email response – job done!

I learned a serious lesson from this.

What we should have realised is that a clarification question at this stage signifies the evaluators are unable to choose a winner. They cannot be sure of what the right score is for an element of our proposal. We can, however, be certain we are in the very top echelon of contenders. They will not send out a clarification question unless we have a real chance of winning. What we respond with will genuinely alter our evaluation score, possibly enough for us to take the prize. Crucially, it's our last shot to dazzle them and climb the scoreboard.

If we underplay the response to the client's email, it will probably cost us everything we invested in this bid to this point. If we cannot use this opportunity to push our score up, our adversaries have a serious chance to eclipse us. And just like that, we'd be relegated to 'runners-up'.

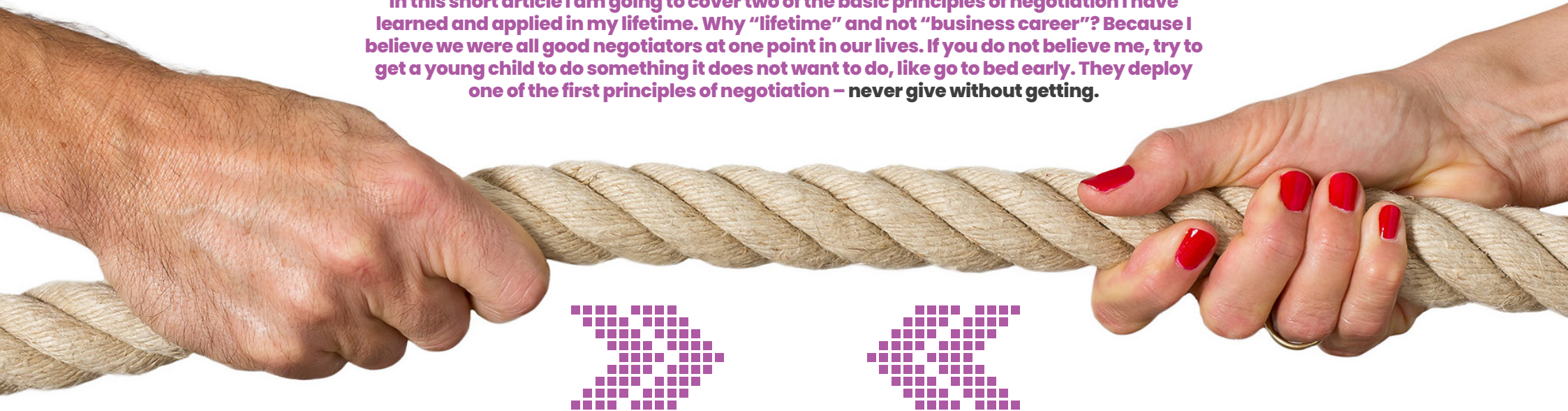
Exactly what had happened that Friday.



TONY BIRCH

LIFELONG NEGOTIATORS

In this short article I am going to cover two of the basic principles of negotiation I have learned and applied in my lifetime. Why “lifetime” and not “business career”? Because I believe we were all good negotiators at one point in our lives. If you do not believe me, try to get a young child to do something it does not want to do, like go to bed early. They deploy one of the first principles of negotiation – **never give without getting.**



You want something from them. In return they want something from you. “I will if you read me a story,” or “Can I just finish this first?”. Clever little negotiators.

So many times, I have seen people preparing for a negotiation by putting together a list of the things they are willing to give away, sometimes even in what order they are going to give them. This is not a bad thing to do – but we should also be listing what we want in return. For example, what would you like back from this prospective customer for the price discount they are demanding?

What if they will not give us what we are asking for? This leads us to the next key principle of negotiation – **if you are not ready to walk away from the deal, you are not ready to negotiate.** Too many times we tell ourselves we are negotiating when in fact we are just conceding.

Whether you are buying a home, a car or closing a deal at work you must be willing to walk away if you do not get a deal that is good for you. Of course, the party on the other side of the negotiation is doing the same thing. If you think you are negotiating but you are not willing to walk away from the deal, all you can do is make concessions until the other party is happy.

That is not what we want to do, is it? So, document what you want to get from the other party along with what you are willing to give. Make a note of the things that will make you walk away from the deal if you do not get them. Then make sure you stick to it!

Prepare yourself emotionally and rationally if you are going into a negotiation. Emotionally, by getting yourself into a mindset where you are prepared to walk away. Rationally, by deciding what you want to get from the negotiation and, in return, the most you would be willing to give.



SNIFFING OUT THE RIGHT OPPORTUNITIES

USING TECHNOLOGY AS YOUR QUALIFICATION GUIDE DOG

“What’s the name of your customer’s dog?”

I’ll always remember this as one of the most unusual, seemingly irrelevant, but brilliantly insightful questions asked in a bid qualification review.

What did the dog have to do with it? Well, it was a tiebreaker in a long discussion about whether we bid or no bid. On the one hand, we couldn’t see any evidence that we had influenced the RFP requirements, or a strong capture plan, or a competitive advantage, or indeed any prior knowledge of the opportunity. On the other, the sales lead insisted he had a really close relationship with the decision maker¹ and we were definitely going to win it.

That’s the problem with subjective decision making: it’s emotional, intuitive, and biased. Sales feel they’ve invested a lot of effort and they’re under pressure to hit targets. Business leaders don’t want to leave money on the table. Proposal teams are overwhelmed and don’t want to risk lowering their win rate.

We need to make bid decisions more objective with a data-driven approach to qualification. That’s where technology can help. Whether it’s a tracker spreadsheet, a survey tool, CRM, specialised software (I’m currently building custom tools using Notion), or full AI-powered decision support.

Here are some ways technology can help us make better bid decisions:

Automated scoring

One way to be more objective is to break the assessment down into raw numbers. The technology converts sentiments into numbers but the goal is the same: to score incoming RFPs based on pre-defined criteria to highlight and compare strengths and weaknesses.

Pre-answering

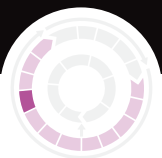
Most proposal management software has automatic answering functions you can use to get a feel for how closely an RFP matches your capabilities. Don’t try to write your response; you’re just testing critical requirements against your pre-written library of content. The more complete, the more likely you’re a good fit for the RFP – but thresholds will depend on the quality and comprehensiveness of your content.

Past performance analytics

Another option is to use technology to analyse and predict your chances of success based on past opportunity data and historical performance. Need to know your win rate for public sector projects under £50k? No problem. Of course, past performance doesn’t guarantee future success, but it sets a baseline for new opportunities.

If you want clearer decision making based on data, not blind optimism and vested interests, it’s time to lose the crystal ball and end the emotional bun fights. Technology helps us make smarter bid decisions and focus resources on the most winnable opportunities. It’s not the decision maker because the emotional/intuitive elements of human decisions are still vital. But it can be an objective guide, a neutral advisor, and a voice of reason.

¹But didn’t know the dog’s name or even if he had a dog.



LEARNING YET?

Learning reviews: they share a dream marriage with the qualification process. It's a sweet relationship where experience informs our approach to future opportunities. We capture what went well and should be done again, what didn't go well and should be avoided, and what should never, ever, be repeated. Like playing kiss-chase at school, when we come to the next game, we run towards Nicky Sweetchops, dodge Riley Brushlip, and flee from Parker Cheesetongue.

Or do we?

All too often we find ourselves working on those 'crackers' bids where the 'extra mature' stink is so great we taste the disappointment of someone who's succumbed to the old chat-up line of, "Oh, go on, it's strategic!"

An important pop-up? Such opportunities usually reveal little more than a shrivelled peanut of a proposition and require much huffing and puffing to get the thing in. They're more of an awkward insertion than dream submission. 'Not a chance?' We smooch our frogs as we search for true love. Sadly, without applying what we learn along the way, we end up in a queue at the Ribbit Hotel.

We bidders are suckers for saying 'yes'. (Indeed, saying 'no' can be hardest thing to learn.) Like serial monogamists who marry many times, we hope the next opportunity will result in our perfect proposal. But in doing so, we sense the awkwardness of knowing that our art is part of a money-making machine.

Like Zsa Zsa Gabor said of her ninth husband, "I want a man who's kind and understanding. Is that too much to ask of a millionaire?" So, we compromise where we can and learn as we go, slogging through the tough bids and skipping through the better ones, knowing things could get better if we worked smarter not harder. Because as Joan Collins (herself married five times) said, "Even when you win the rat race, you're still a rat." It's better not to be a rat. Instead, be the well-trained racehorse running a different and more exciting race.

Reflect upon your personal performance and that of your team, conduct formal learning reviews, and – critically – apply this learning to the next opportunity.

Honour the marriage between learning reviews and qualification. Don't shy from it. Learn quickly and qualify early. As Mickey Rooney said after his eighth marriage, "Always get married in the morning. That way if it doesn't work out, you haven't wasted the whole day."

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LIKE SERIAL MONOGAMISTS WHO MARRY MANY TIMES, WE HOPE THE NEXT OPPORTUNITY WILL RESULT IN OUR PERFECT PROPOSAL. BUT IN DOING SO, WE SENSE THE AWKWARDNESS OF KNOWING THAT OUR ART IS PART OF A MONEY-MAKING MACHINE. ”

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THE REVIEW ADVANTAGE – HELPING TO WIN FUTURE DEALS

What's the first thing that gets dropped from your bid process?

Yep, you're right, it's the lonely ol' learning review that gets forgotten about. We're onto the next bid and can't get everyone together anyway, so "Let's just leave it for this one". But here's the thing...internal and external/client learning reviews are like gold mines for winning deals/contracts. They create significant learning opportunities for you and your team.

They help you:

- **Learn and improve:** reviews help us learn from past bids – both the wins and the near-misses. By spotting patterns and refining our strategies, we get better with each attempt.
- **Understand the competition:** we're not in this alone and to truly understand how we fare against the dastardly competition, who better to give us intel but our clients?
- **Build team spirit:** facing the challenges together and not brushing issues under the carpet may be tricky at first but it will improve collaboration and motivation in the short – and long-term.

When should you hold reviews?

- Hold your initial internal review within two weeks of the bid submission while it's fresh in everyone's minds
- Ask your client for a debrief. Depending on the process and whether public vs private sector, this may be following the formal evaluation process – but the earlier, the better.
- Potentially you'll need to hold another internal review following the client debrief and outcome

Running the review:

- Have an independent facilitator – someone who has the skills but hasn't been involved in the bid
- Email everyone involved in the bid requesting a response with two things that went well, and two things that could be improved
- Decide on the topics for the review meeting based on the consensus of the email responses
- Honour what went well and treat anything that didn't as an opportunity to improve, not to blame
- Capture client and competitive information that may be useful for future bids
- Document key learning points with action(s) required, owners and agreed milestones and share with the group
- Share this key learning regularly with senior stakeholders (perhaps quarterly depending on how often you're bidding)

Capturing client feedback

- Again, an independent facilitator is ideal – what if your client didn't like the client-facing team?! The client is likely to be more open with someone independent.
- Prepare questions on the following topics:
 - What did you think of our offer? E.g. the strengths and weaknesses of your offer vs other bidders
 - How was our engagement during the bid? E.g. the quality and responsiveness of engagement, professionalism, handling of negotiations, etc
 - How was the quality and impact of our proposal? How did we perform against your evaluation criteria? What could we have done to make a better impact or score higher?

So, win or lose...embrace learning reviews. They'll drive improvements, improve collaboration and ultimately help you win more!



PUT YOURSELF IN THE FAVOURED POSITION TO WIN AGAIN



You should begin your contract renewal strategy 12 – 24 months ahead of contract expiry depending on the contract's complexity and the strategic nature of your client. You have a natural advantage as the incumbent when your client is considering their renewal options (even in public sector contracts where tenders are awarded on a 'level playing field' basis).

But having spent 15 years in procurement before entering the world of work winning, I have learned many incumbents are complacent when it comes to contract renewal. Use your position as incumbent to engage early with your key client stakeholders, capture intelligence and help shape their requirements for the new contract.

Why are they renewing, and what has changed?

Understanding why your client is thinking of renewing their contract is important.

It may simply be because public procurement regulations dictate the contract needs to be re-tendered. Or it could be they want to test the market to understand if other companies can bring something new, better or different to the table.

You should also consider what has changed in your client's world since they last awarded you the contract. This could be within a political or external context, e.g. government policy or their

priorities in relation to ESG. It could also be from an internal change, or where they want to take advantage of new technologies or innovations in the market.

Reinforce the value you have already delivered

Be sure to remind clients of the value you have delivered throughout the lifetime of the existing contract, whether that be performance improvement, efficiencies or cost savings. Use performance data against contract KPIs and proof points captured as part of your contract management process to reinforce this.

Use your position to influence the client's specification this time around

As the contract holder, you can use your contract insights to your advantage. Help your client understand how you can work more efficiently or introduce innovations and technology to deliver contract improvements. Position these improvements/cost savings in a way that demonstrates their benefits to the client and offer examples of successful implementation on other contracts. Also identify the discriminators important to your client and highlight your unique ability to deliver them.

Pull everything together in your renewal proposal/re-tender

Once it comes to re-tender (or if you can get yourself into a negotiated renewal position), use the intelligence and positioning to develop a compelling, client-focused proposal that makes it easy for your client to reappoint you while leaving the competition in your wake.





ABOUT OUR EXPERTS



Martin Smith

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



Isabella Stevenson

Bella started her career in bids over 14 years ago working for a recruitment consultancy co-ordinating their EMEA-wide bid submissions. For the last 10 years, she has worked as a Bid Manager, mainly within the EV infrastructure and built environment, but also in sectors as diverse as facilities management, security and dentistry.

She enjoys collaborating with technical teams via workshops and review sessions to build win themes, install best practice and develop creative thinking to win more contracts and help organisations meet their business development objectives.



Simon Wellstead

Simon is the Managing Director of SMSW Media, a creative and 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 simplify and challenge at all levels means that he can cut through the crap and unearth true value propositions.



Chris Kälin

Chris is a global authority on bid and proposal management. He was co-founder and chairman of the German-speaking APMP chapter and regional director for Europe/Africa. He is APMP-certified at Professional Level (CPP APMP) and is an APMP Approved Trainer. In 2013, he received the prestigious Fellows Award.



Michael Brown

Michael Brown is a seasoned bid professional having won multiple projects across the built environment throughout Europe, the Middle East, APAC and North America. He is passionate about leading global teams to deliver top quality proposals and pitches to multinational clients.



Chris Whyatt

Chris is the co-founder of the UK APMP, prior to which he founded and led Practical Bid Solutions, and its successor, Get to Great Results. He has worked on major growth initiatives, sales and channel growth, sales turnarounds, must win deals, and sales and bid process improvement.



Jeremy Brim

Jeremy works with leadership teams and business owners as a consultant and advisor to plan and deliver sustainable growth through analysis and interventions across the sales cycle. Jeremy has also taken on leadership of the Bid Toolkit, bringing with him a wealth of bidding knowledge and desire to help businesses of all sizes improve their win rates.



Izane Cloete-Hamilton

Izane is the Master of Inspiration at nFold, a strategic proposal consultancy in South Africa. She is a compassionate leader with a rare and innate ability to develop people. She has held various senior management positions in business development, marketing, and bid management for over 20 years. Izane joined nFold as a partner in 2021, where she continues to inspire success in others through thought leadership, training and strategy development.



Dr Karen Croshaw

Karen has been involved in bidding and tendering for nearly 25 years, firstly with universities and training providers, then in large private sector organisations. She now runs her own successful freelance bid consultancy. Her consulting career spans public and private sector bids including government frameworks, nuclear, rail, road, construction, digital, defence, healthcare and skills. She has strong Middle East bid/project delivery experience gained by living and working in the UEA, Saudi Arabia and Oman, where she also trained and qualified as a scuba instructor.



ABOUT OUR EXPERTS



Graham Ablett

Graham Ablett is a Consulting Director at Strategic Proposals, where he 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.



Ceri Mescall

Ceri Mescall is the Managing Director at Strategic Proposals Canada. Clients trust her to help them win. Ceri's a thought leader - a presenter/panelist, podcast guest, article author/contributor, and awards judge. She holds all four signature Association of Proposal Management Professionals (APMP) certifications plus the Executive Summaries and Bid & Proposal Writing micro-certifications. Ceri was an APMP 40 Under 40 award winner (class of 2019), and is an APMP Fellow (2020) and APMP Accredited Trainer (2024).



Jon Williams

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 35 countries; and trained many thousands of course participants.



Clare Foley

Clare Foley is a Bid Manager with over 16 years' experience in IT, Defence and other industries. Her interest in personal development grew from a desire to manage the demands of her role. She qualified as a Coach in 2020 and now provides coaching to help individuals achieve more with less stress. She also provides training to organisations who want to enhance team performance through a focus on wellbeing.



Jim Carley

Jim Carley, founder and Managing Director of Carley Consult Ltd, leads a top bid consultancy in the vocational education, employability, and justice sectors. His firm won APMP's UK Supplier of the Year Award in 2021. He chairs APMP UK's Procurement Group, is Vice President of the Doncaster Chamber of Commerce, and directed Doncaster's successful city status bid in 2022. His book on the campaign is **available here**.



Javier Escartin

Javier is an aerospace engineer who has climbed the corporate ladder from engineering to business development. He is a full-time freelance Proposal Manager and has recently launched a business to make our work easier with artificial intelligence.

He is the founder of DeepRFP.com, runs the proposals newsletter jescartin.com, and manages proposals for worldwide technology companies as a consultant.



Sarah Hinchliffe

Sarah labels herself a 'Storyteller, Organiser, Timekeeper' - three things that come naturally to her. After a 30-year sales career in the IT industry, where she learnt every popular sales methodology and sold millions of pounds of software and services, Sarah decided to share what she'd learnt about winning business using great stories, a systematic approach and consistently delivering on time. She continues learning and sharing through her freelance consulting work and volunteering as a writer, speaker and mentor.



Rita Mascia

Rita's journey into the world of bids and proposals started while working for an award-winning language and culture business organisation. Rita is a bid professional with 24 years of experience in the public, private and not for profit sectors. Her expertise in the bid cycle includes business development, capture, bid management, bid writing, and contract negotiations. Her passion lies in leading teams to win business by producing persuasive proposals that deliver what they promise.



ABOUT OUR EXPERTS



Samantha Burns

Sam Burns CP APMP is a Senior Bid Manager at EIB. Sam has over 11 years' experience and has worked in both the private and public sector, helping clients win transformational projects across the UK and globally. She has a passion for technology and pioneering solutions in the full business development lifecycle.



Kathryn Potter

Kathryn's experience in bid writing covers sectors as varied as IT outsourcing to financial services, security services to reprographics and construction and rail. She sees content as the cornerstone of proposal development and understands that no matter what, it needs to be relevant and up-to-date.



Nigel Dennis

Nigel has been called a proposal pioneer in Australia for his work in shaping the professional bidding landscape in the region. He has three decades of proposal consulting experience and has trained thousands of people. Nigel started the APMP Australia New Zealand Chapter, runs Australia's largest specialist bid consultancy and is a strong advocate for development of the profession.



Anders Dyrholm

Anders Dyrholm is a Client Manager at the Danish bid and process management software company Orbit Online. He works primarily within the AEC sector, consulting or managing projects for over 100 companies and specialises in resume and reference management solutions. He is also the lead organiser of Denmark's first Proposal Conference in September 2024 in Copenhagen.



Pippa Birch

Pippa owns Pipster Solutions Ltd – an award-winning bid consultancy. Pippa has been a bid writer for over 20 years, mainly in highways and civil engineering. She is well known in the sector and is an active member of the Institute of Asphalt and has won several industry awards. Pippa went freelance in 2012 and started growing the Pipster team during the Covid pandemic. She is APMP Professional certified and mentors other bid professionals, winning Contribution to the Profession in 2022. She also developed #ThursdayThrong and #BidBites – free online meetings for the bidding community to reduce isolation.



Lisa Readman

Lisa is an expert Content Evaluator and APMP Certified Practitioner as well as a highly skilled proofreader and copy editor of bidding, sales and marketing documents. Her bid and proposals career began in 2003 and she established her own business (Readman Writes) after 15 years as a Bid Writer, Bid Coordinator and Knowledge Manager. Lisa combines her unique skillset and passion for words with a sensible, commercial approach to clear and concise written communication.



Holger Garden

Holger is a bid manager and writer, and a personal/team performance coach. He spends most of his time supporting construction clients bidding for civil infrastructure and building projects, but his transferable skills have led to his work in the medical, charity and security arenas also.



Kat Wyon

Kat is the Research Director for Strategic Proposals. Having set up bid teams and worked across Telecomms, IT, Financial Services and Service Management, she is experienced in the world of sales and bidding across multiple sectors.

Kat has successfully defined and implemented best practice processes whilst being responsible for recruitment, management and motivation of staff within bid teams. She has driven the transformation of teams with the ability to create a mission statement for the team and strategically deliver against that mission.



ABOUT OUR EXPERTS



Larissa Cornelius

With over 12 years in business development and proposal consultancy, Larissa offers bid expertise across various industries. She has trained thousands of people and worked with over 260 companies on strategic bid work. She has a further seven years of operational management expertise and actively promotes the proposal profession by combining proposal best practices with her operational and sales background, helping businesses win more.



Peter McPartland

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.



Andy Haigh

Andy is an expert in bidding and tendering, specialising in competitive formal bids into EU Public Sector organisations. He 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.



Tony Birch

Tony Birch is the founder and current Chairman of Shipley Limited in the UK. Tony served on the main board of the APMP for four years and was elected a Fellow of the organisation in 2006, for his work in developing and launching the APMP's Certification Programme. Since founding Shipley, Tony has trained thousands of sales and bid professionals around the world.



Darrell Woodward

Darrell Woodward is an award-winning consultant helping organisations unleash the full power of proposal automation to win more business faster. As a Bid Geek and coffee lover, he believes technology in bidding is about combining the right blend of content beans – compelling narratives, tailored solutions, and persuasive arguments – and the expertise of bidding baristas to craft the perfect proposal brew.



Dr Nigel Hudson

Affectionately known as 'The Bid Doctor', Nigel has a doctorate in workplace learning and is BQ's resident professional development expert. His research was an industry first, exploring how people learn from experience within the bid profession. It builds upon his 25-year career, coaching and leading sales and bid teams, training more than 5,000 people worldwide, winning multiple awards for his bid academies, and – with Jon Williams – creating Europe's leading proposal training syllabus. A customer and people champion, Nigel's mantra is: "What does the customer value most, how will we deliver it better than the competition, and if we do this, will we have fun?"



Lorraine Baird

Lorraine specialises in helping organisations to win – evidenced by her personal win rate of over 85%. She's recognised for equipping bid teams with the right skills and tools to produce winning proposals and pitches for their organisations. Formerly heading up the bid team at Aviva, Lorraine's career in sales and bidding spans over 20 years. Lorraine is qualified at the highest level of certification in the profession – APMP Professional – and also recently attained the new APMP Capture Practitioner certification.



Paul Johnstone

Paul is a 'poacher-turned-gamekeeper'. He established Optimum Business Growth in 2020 after spending 15 years in procurement roles across financial services, manufacturing and the public sector. He has led strategic infrastructure deals and large Framework Agreements. He knows 'what good looks like' to buyers, enabling him to help clients win profitable contracts using a more strategic approach to winning work. Paul has also developed the award-winning Bid Journey methodology.

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