

GROWTH 
 **IGNITION**

the bid toolkit

Housekeeping

- This webinar is being recorded and will be posted on the alumni hub before COP today. It will be housed on the same webpage that you used to register for this webinar.
- There are two chat functions, please use the classic chat to express any opinions, to network with peers, or voice any tech issues.
- Only use the Q&A chat to ask questions. I will not be addressing the questions posted in the normal chat.



Agenda

the bid toolkit

- Introductions
- Overview
- Research and Pursue
- Bid Decision
- Win Strategy and Kick off
- Solution and Story
- Write and Price
- Review and Finalise
- Wrap Up

Growth ignition





Have an opportunity in mind

Why the public sector require robust procurement processes

HUFFPOST

POLITICS

01/03/2019 07:29 AM EST

Brexit Ferry Firm Accused Of Copying Web Page From A Takeaway Shop

"Fish and chips, curry, Chinese, kebab or pizza. Seaborne Freight certainly have plans to take away our money."



SuffolkRed
@THEmrschomsky

Seabourne Freight shares the same registered Address, 59 Mansell Street, as the Maritime Law firm Campbell Johnson Clark whose Director is called Mark Bamford, I did two minutes of research, Antony Bamford of JCB is a huge Tory party donor, his brother is called Mark#seabourne



NewsThump

5 hrs · 🌐

Contract to supply NHS handed to bloke who saw Casualty once



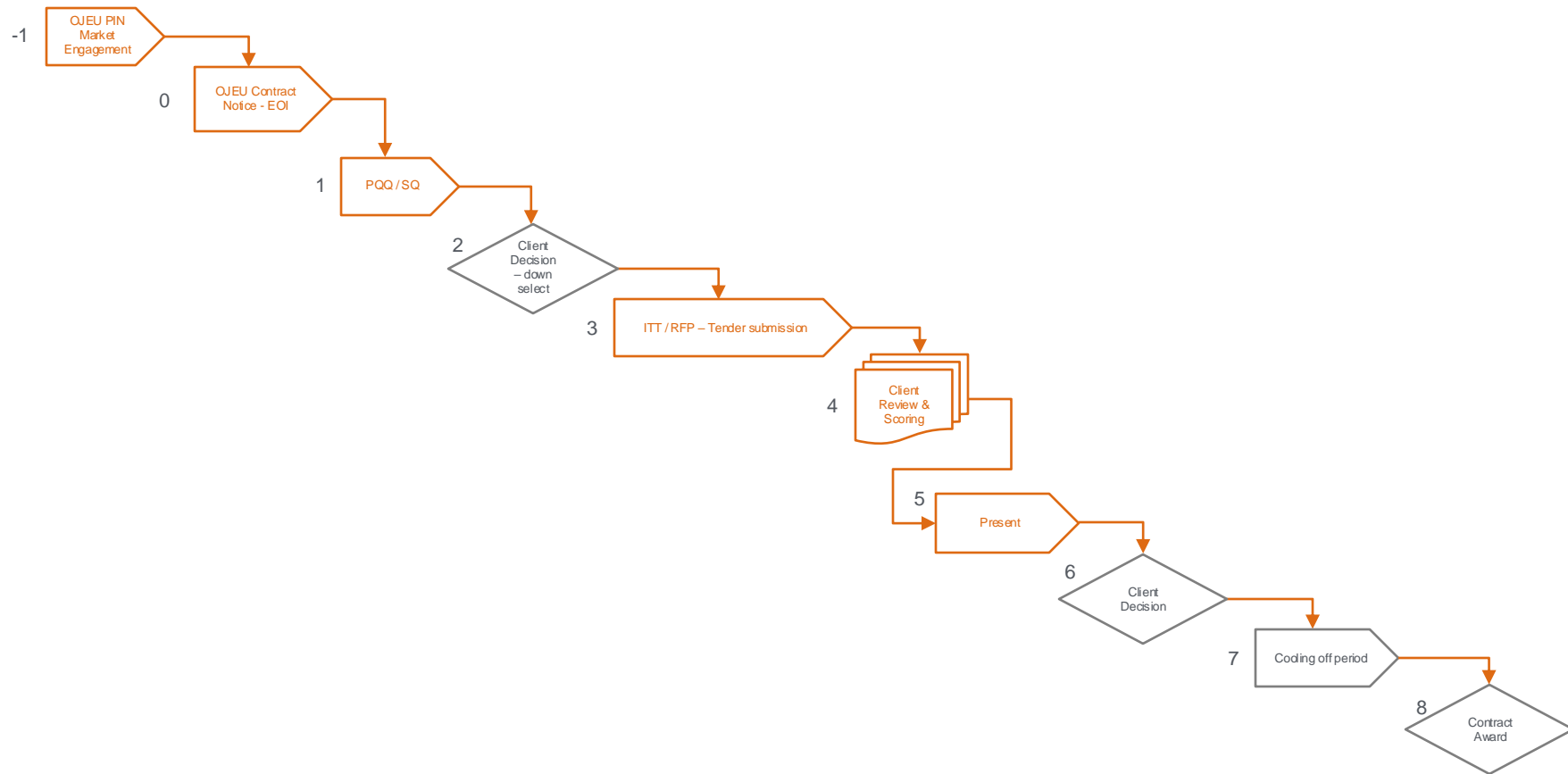
NEWSTHUMP

Contract to supply NHS handed to bloke who saw Casualty once

👍 🤔 🍷 4k

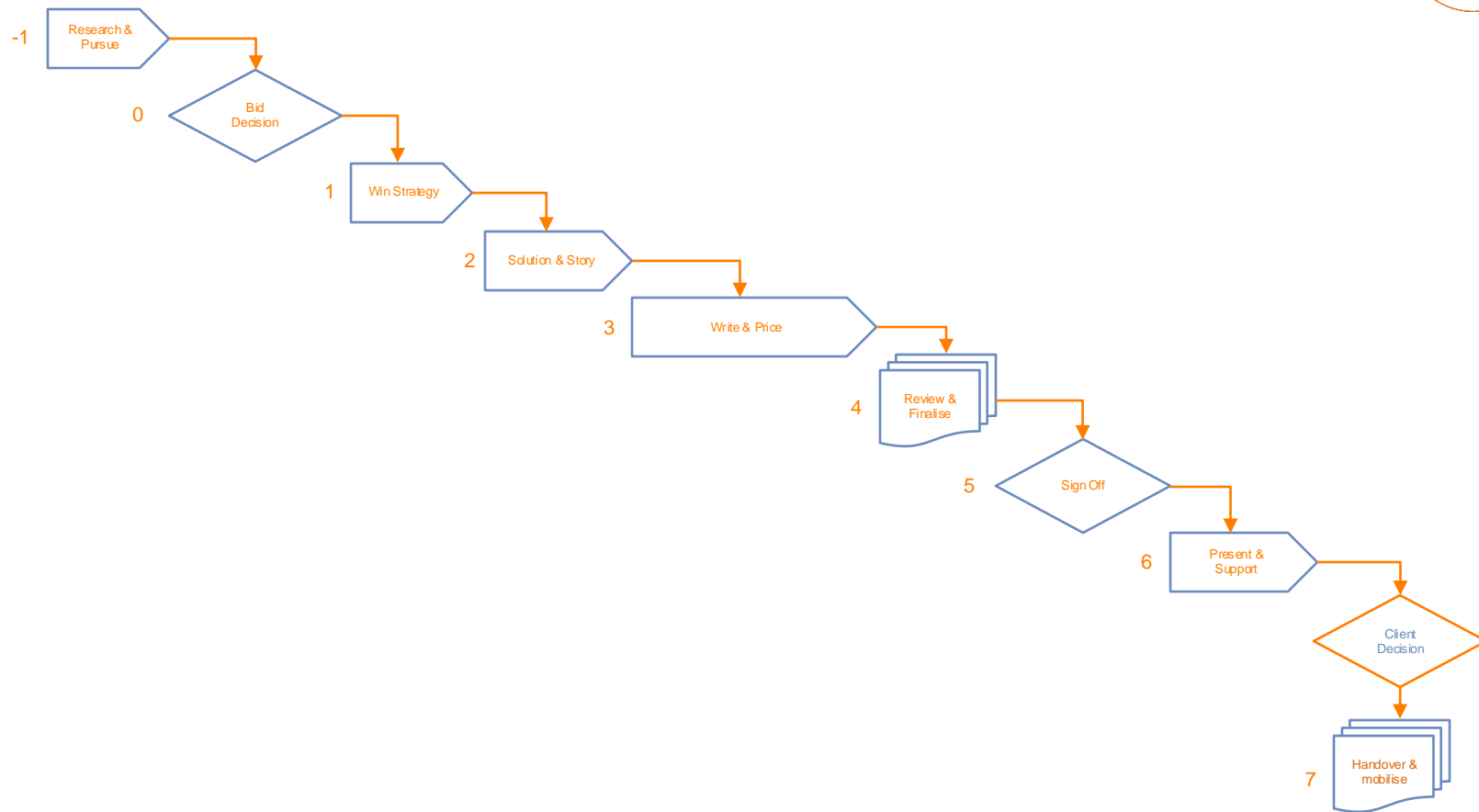
125 comments 2.3k shares

What's involved



The bid lifecycle

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Our roles and responsibilities

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Sponsor



Designated Signatory



Sales Lead



Bid Leader



Service Delivery Leader



Bid Manager



Commercial Lead



Contributors



Document Publisher



Independent Review Panel Members

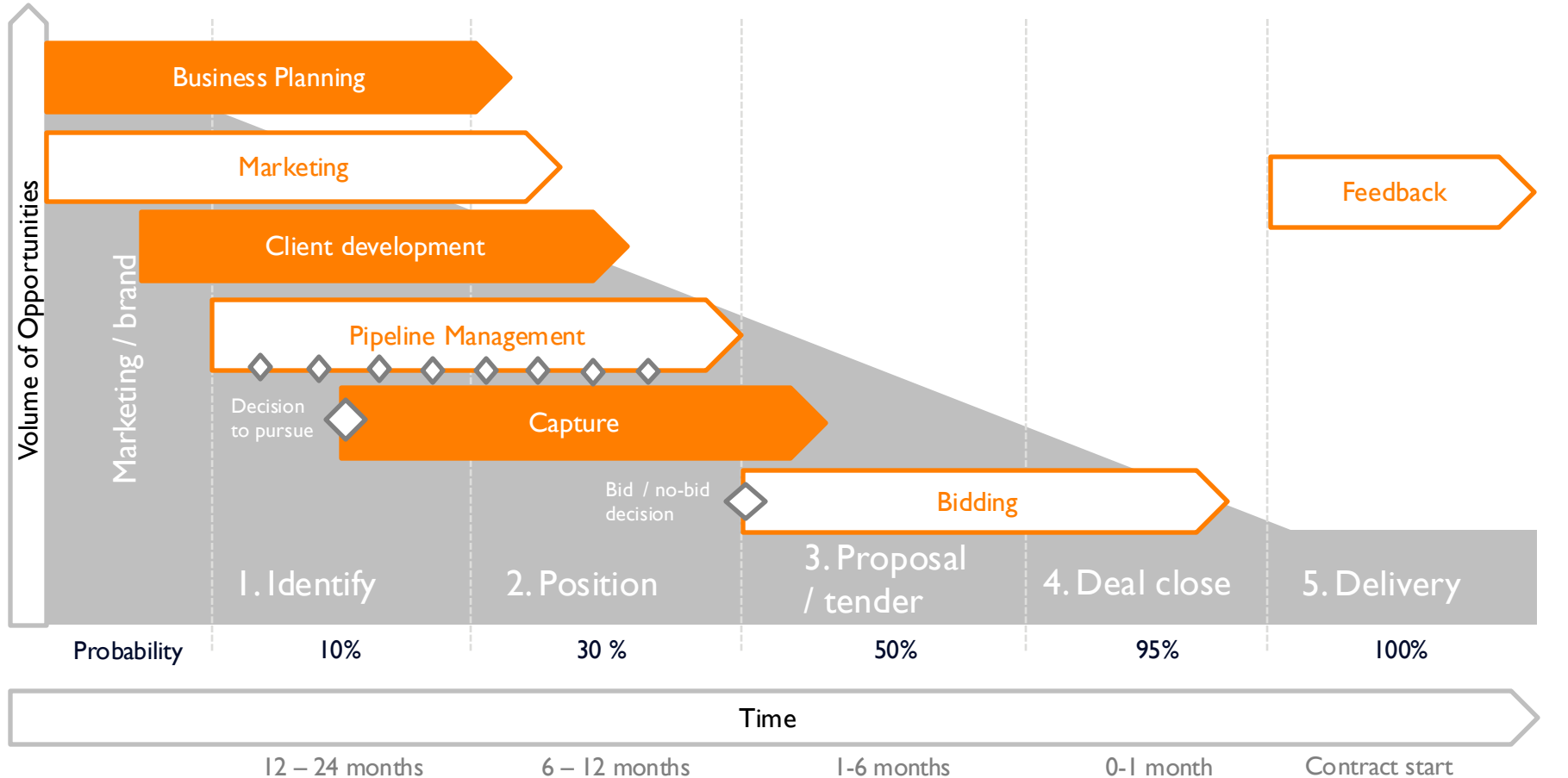


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**If you haven't influenced the client
someone else has**

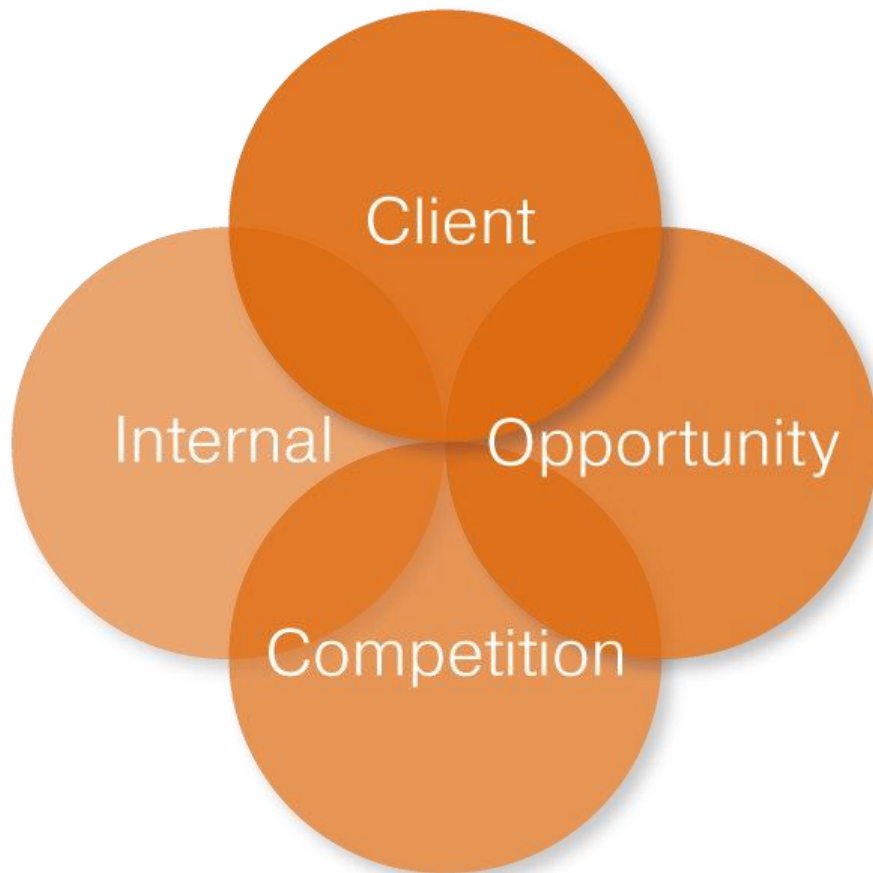
Sales Funnel



- Not dealt with in detail today, but the principles are aligned

Gathering research





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Bid decision

Key areas of assessment

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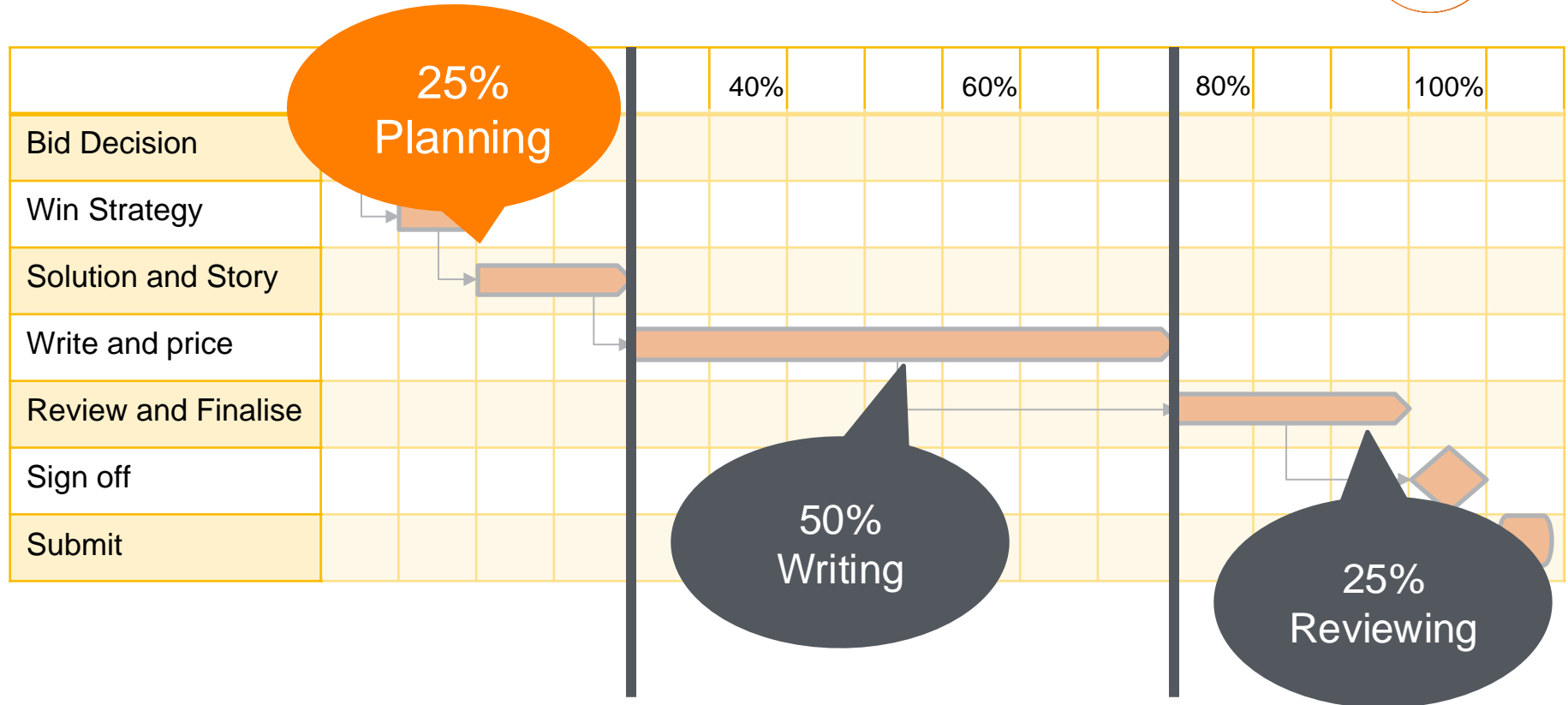
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Win strategy and kick off

Importance of planning and reviewing

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Approach



Phases of strategy development and communication

Preparation

- Verify pursuit data
- Further Research
- Prepare for strategy session

Strategy session

- Prior to RFI/PQQ release?
- Small team
- Develop strategy

Kick off meeting

- Once PRP/ITT received
- Communicate strategy to wider bid team

Preparation



Successful strategy is grounded in good preparation



- Read the client documentation and instructions carefully
- As soon as the client documentation is received the Bid Leader and Bid Manager should meet to break down the requirements and define the best approach to submitting a winning bid.



Bid Plan

- The Bid Manager should build a draft Bid Plan as soon as possible
- It's a single project management tool for the bid
- It breaks down the client requirements and becomes the single management tool for the bid
- It drives compliance with client requirements on page limits, font, and evaluation criteria
- It captures all contributors' actions and deadlines
- Provides a tracking dashboard of progress
- Updated and published every day
- Captures format, logistics and client delivery requirements
- Includes an internal and external directory of the bid team and stakeholders

Bid Programme

- Schedule backwards from the deadline
- Plan time for bid strategy and preparation (first 25%)
- Be efficient
- Create a work breakdown structure (WBS) for all tasks
- Agree your communication approach
- Use the schedule to review and drive action
- Allow sufficient time for reviews and document production (final 25%)
- Plan for document production conservatively and allow for contingency
- Only change the bid programme if absolutely necessary and over-communicate change clearly

Scheduling Tasks

Writing: New
material
=
4 pages/day

Writing: Extensive
revision
=
8-10 pages/day

Final document review
=
40 pages/day

Final document review
(with extensive
boilerplate)
=
80 pages/day



Read the client documentation and instructions carefully

- Highlight key rules and write them into a Compliance Matrix
- Put the compliance Matrix on the wall of your War Room if possible
- Make special note of delivery instructions

Later you will

- Write key rules into storyboard templates or note it on the flipchart pages
- Ensure you structure responses in accordance with the client instructions

Strategy Session



Client need & insight

Requirements

Business Case

Hot Buttons

Environment Analysis

Relationships

Competition

SWOT

Why us?

Discriminators

USPs

Value Proposition

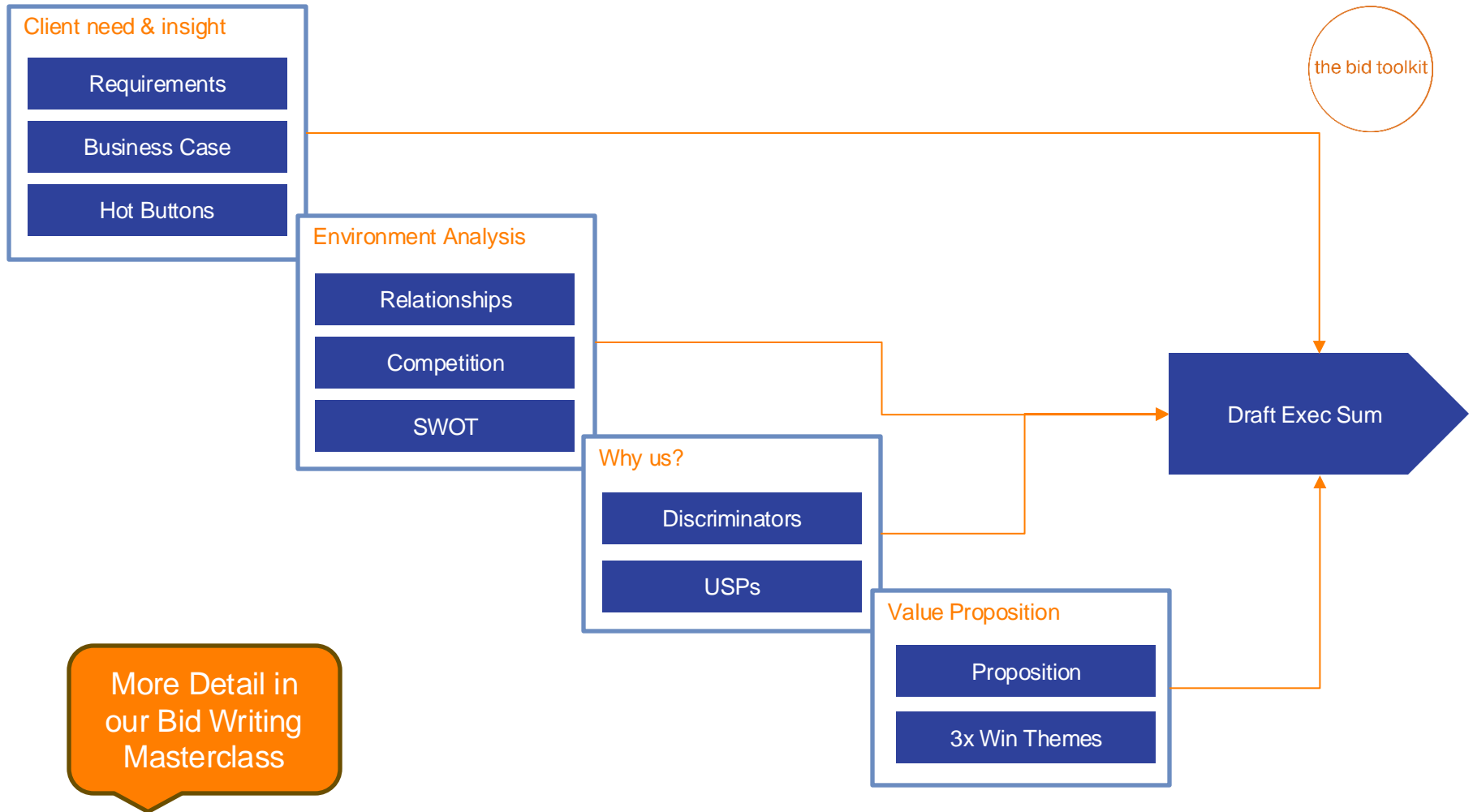
Proposition

3x Win Themes

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Draft Exec Sum

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[illegible]

Why us?



Why us?

Discriminators

USPs

Discriminators

Why are we different in the detail?

- Discriminators are features of our solution or offer that differ from a competitor's offer and are understood by the client to be important to them.
 - i.e: The colour of a hotel room versus your own bedroom
- In our view a discriminator may feature in one or more responses, but not in many. They are specific pieces of additional value we can bring in the detail of our offer.
 - i.e: we may have a better Health and Safety accreditation than the competition, and health and safety is important to the client

Can be prepared in advance...

May need to revisit after your solution development

Why us?

Discriminators

USPs

USPs

Our 'Big Ticket' value points

- A unique selling point (USP) is a 'super-discriminator' that brings significant value to the client, can feature repeatedly across responses, is unique to you, and be should noted in the executive summary.
- ie: we have a team of people who have delivered significant evidenced value on a similar project for another similar client, who will save the client significant time and resources in mobilising and bring unique insight that nobody else has.

Can be prepared
in advance...

Proposition
development



Value Proposition

Proposition

3x Win Themes

Value Proposition

- “A value proposition is a statement which identifies clear, measurable and demonstrable benefits consumers get when buying a particular product or service.
- It should convince consumers that this product or service is better than others on the market
- This proposition can lead to a competitive advantage when consumers pick that particular product or service over other competitors because they receive greater value.”

Value Proposition

Proposition

3x Win Themes

Win Themes

What are our three big messages?

- The headings from our proposition become our three win themes.
- We try to restrict it to three as people do not tend to remember more than three things from any form of communication
- The win themes are three statements that sum up the outcomes we will deliver for the client and the value those outcomes generate for them.

A warm-toned photograph of a desk setup. In the center is a white, slim-profile keyboard with a person's hands typing on it. To the top left is a white cup of coffee on a saucer. To the bottom left is a smartphone displaying a bar and line chart. To the right is a tablet. The entire image has a soft orange overlay.

Executive Summaries

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Kick off meeting



Kick Off Meeting Management

Brief the team

Agree roles and responsibilities

Agree actions and contributions

Agree bid programme

Plan for upcoming activities and meetings

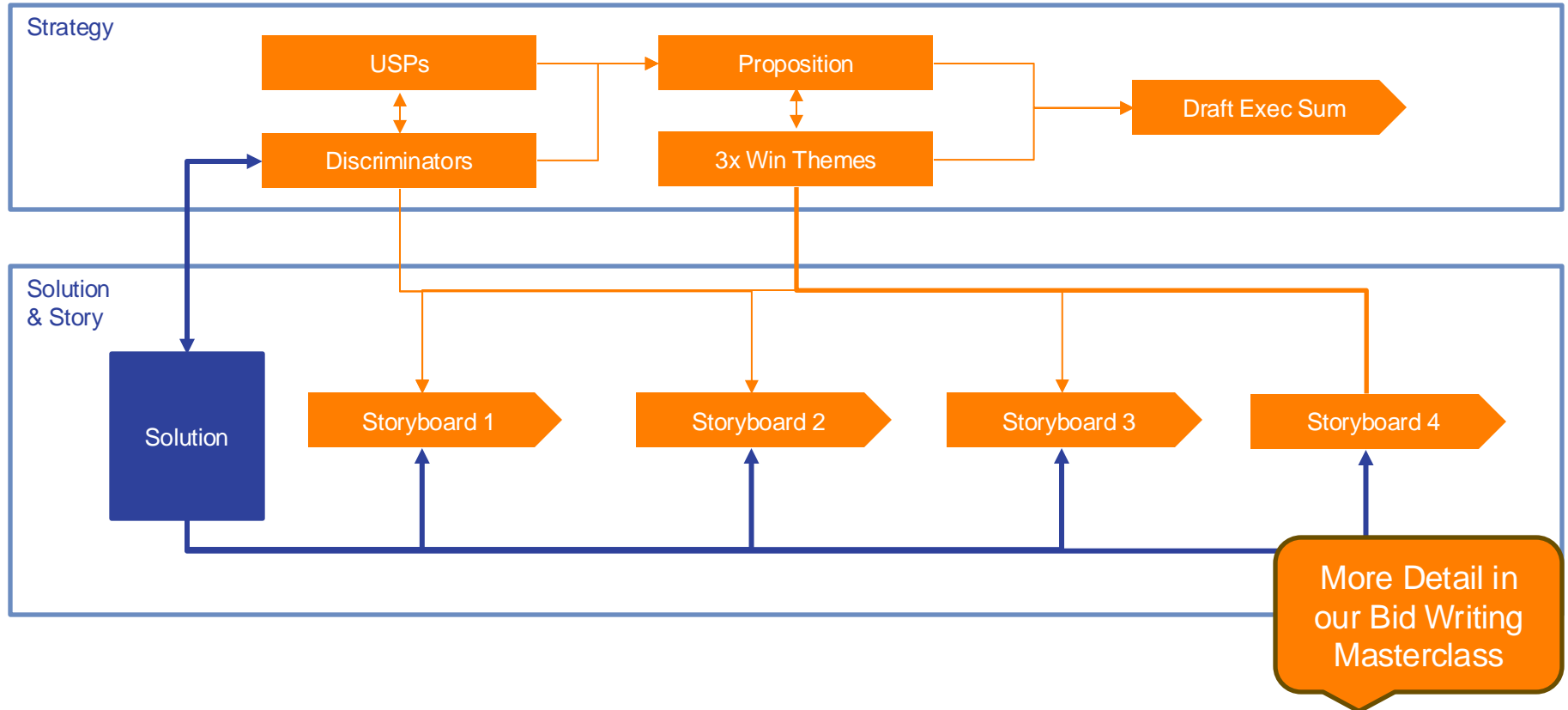
Build team spirit



Solution and story

The solution feeds the rest of the document

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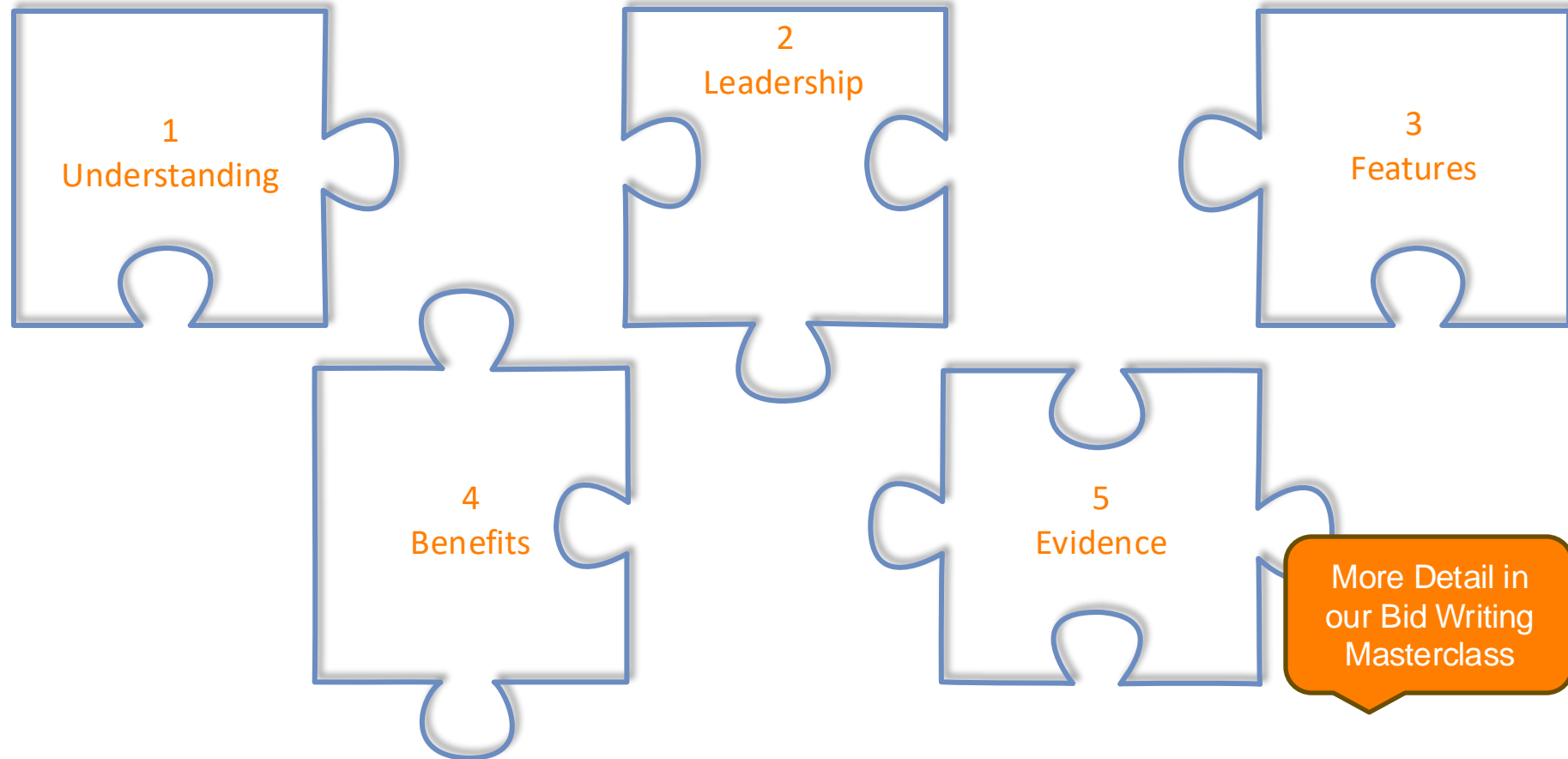


Proposal basics



Basic rules of successful proposal responses

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Storyboarding



What is a storyboard?

- Storyboards provide us with a **plan** for each response setting out how we will respond to a question and scoring criteria.
- They break each question, and any associated scoring criteria, down into their component parts, ensuring we are compliant in our response.
- They drive us to answer the question fully, to sell through the benefits of our solutions, and to provide confidence through evidencing our responses.
- They also provide an audit trail for reviewers and stakeholders to refer back to later.

The benefits of storyboarding

- Creates a framework so that everyone knows what they should write
- Kills 'fear of the blank page'
- Helps us communicate the win themes in the right places
- Provides a logical, balanced flow of information through the submission

Review the specification

- Take the time to read and review all available specification documents
- You must develop a robust understanding of the clients requirements to ensure compliance, to build your solution and to be able to submit a sound commercial offer
- Once you understand their baseline requirements - you can then highlight areas of your offer that are above their requirements as added value



How do I go about storyboarding?

1

Get the team in one room – the right heads focused on the task together

2

Breakdown the questions to build the responses

3

Doesn't matter what medium you use, white boards, flip charts, PowerPoint and screens – just do it!

4

Every response must be assigned an owner and identified supporters

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Write

Running order



- Follow the clients running order, unless agreed other wise
 - Ensure your responses are played back to the client in the same order that they ask the questions.
 - Preferably mirror the clients numbering for reference purposes
 - If their order is particularly poor, request to reorder your responses (chronologically for instance) by clarification. Insert a 'compliance matrix' in their order at the start of the document so they can still find content easily

Reflecting Client philosophy, terminology and language



- Create a schedule of the clients language, terminology and abbreviations
 - You must get to know the client and the language they use to describe themselves, the service / product they are procuring and how they refer to you as a supplier.
 - Create a schedule of their terminology. Have a large printed copy of the wall of your war room and issue a soft copy to all response writers
- Refer to their vision and philosophy – show empathy and alignment

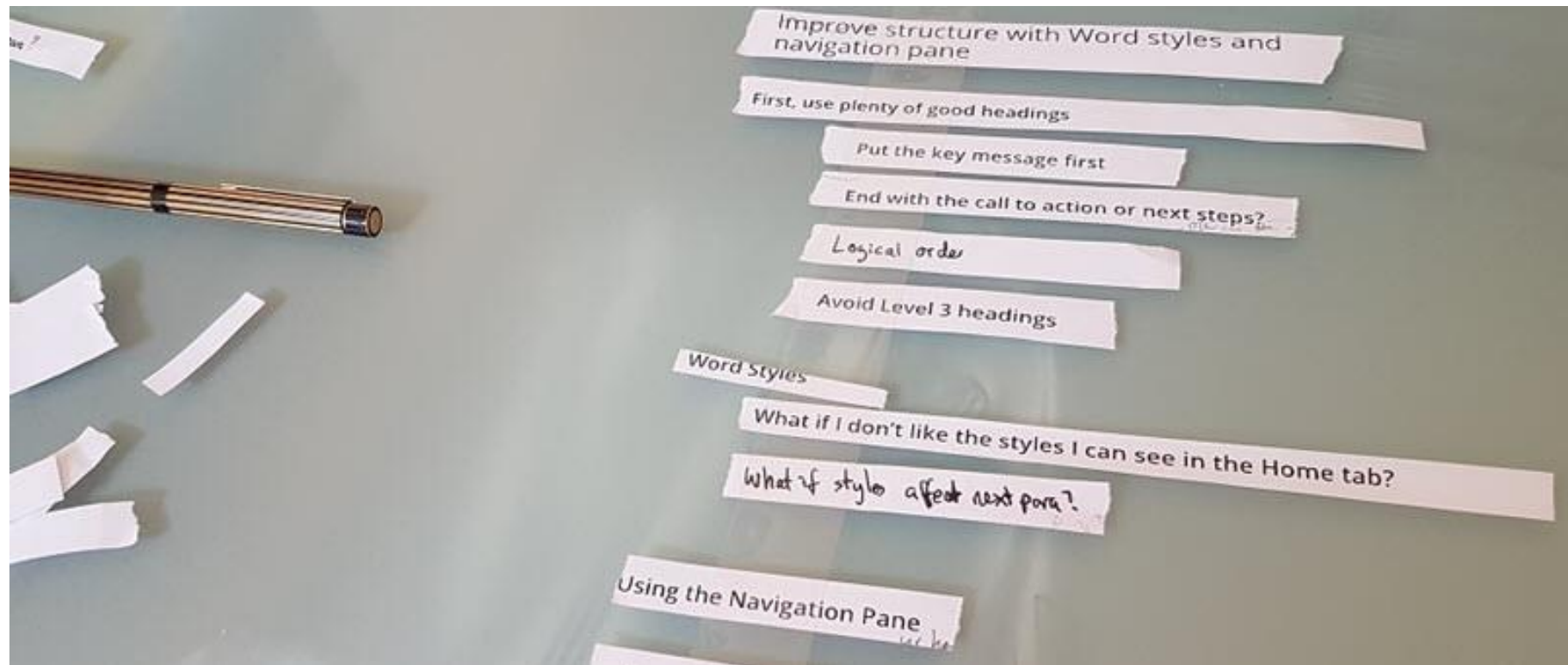
Reader empathy



- Who is likely to be the reader / scorer of the response?
- Do we know them? Can we test it with them? Or another friendly similar client?
- What will they want to hear about / what is important to them?
- Will they want a more visual response or detail / weight?

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Headings



- Resist the temptation to just tell the client what we do, ie: just the features of your offer



- Savings, efficiencies, cashable benefits



- Shorter delivery programme or time savings for the client

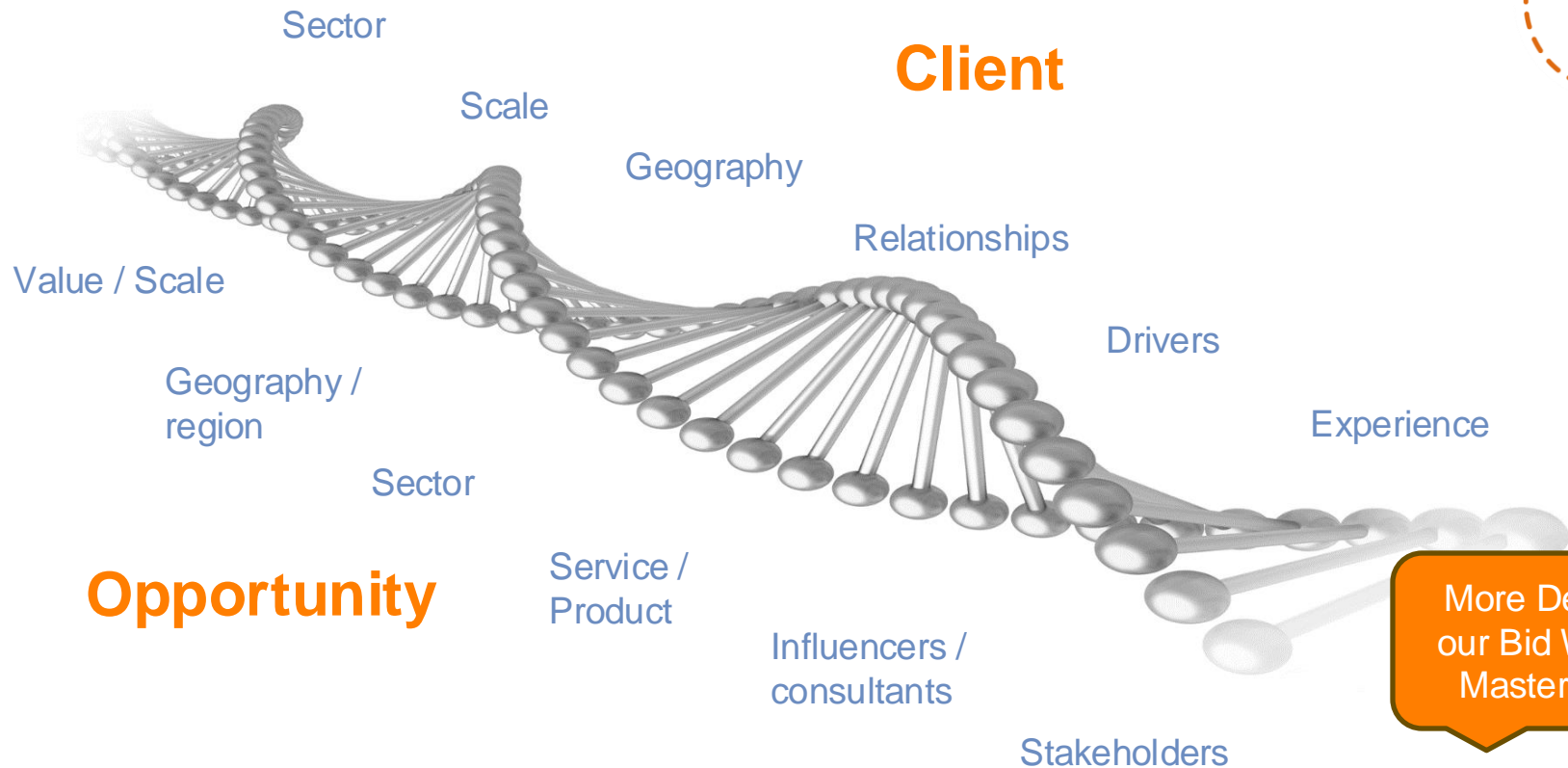


- Examples inc: reduced staff turnover, improved health, better exam results

Think ‘so what?’ – what will this feature do for the client?

Selecting evidence based on 'DNA'

TOP
TIP!



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- **Paragraphs** allow you to display little ‘chunks’ of text on a specific theme, making it easier to read than many lines of text. **Paragraph Power of Five - Use up to five sentences, keeping paragraphs to five lines deep.** Leave white space between paragraphs.
- Try not to use more than **15 words per sentence**. Don't keep adding comma after comma: replace with a full stop. **Short sentences are impactful.** A mixture of sentence lengths helps the text to flow and enhances readability.
- Each sentence must make sense on its own: otherwise, it's just a group of words and will confuse the reader.
- **Do not use formal wording that you wouldn't normally use.** (ie: per annum Vs a year)
- Never use a long words if a **short word** will do (ie: consequently Vs so)
- Do not use negative language or terms, **keep it positive**

Read it aloud – does it flow nicely?



Avoid large blocks of text on the page

No padding out!



**Avoid padding out your document,
especially with generic brochure content**

Beware of copy and paste



Using library content is fine.

But be careful!



Don't just rely on spellcheck.

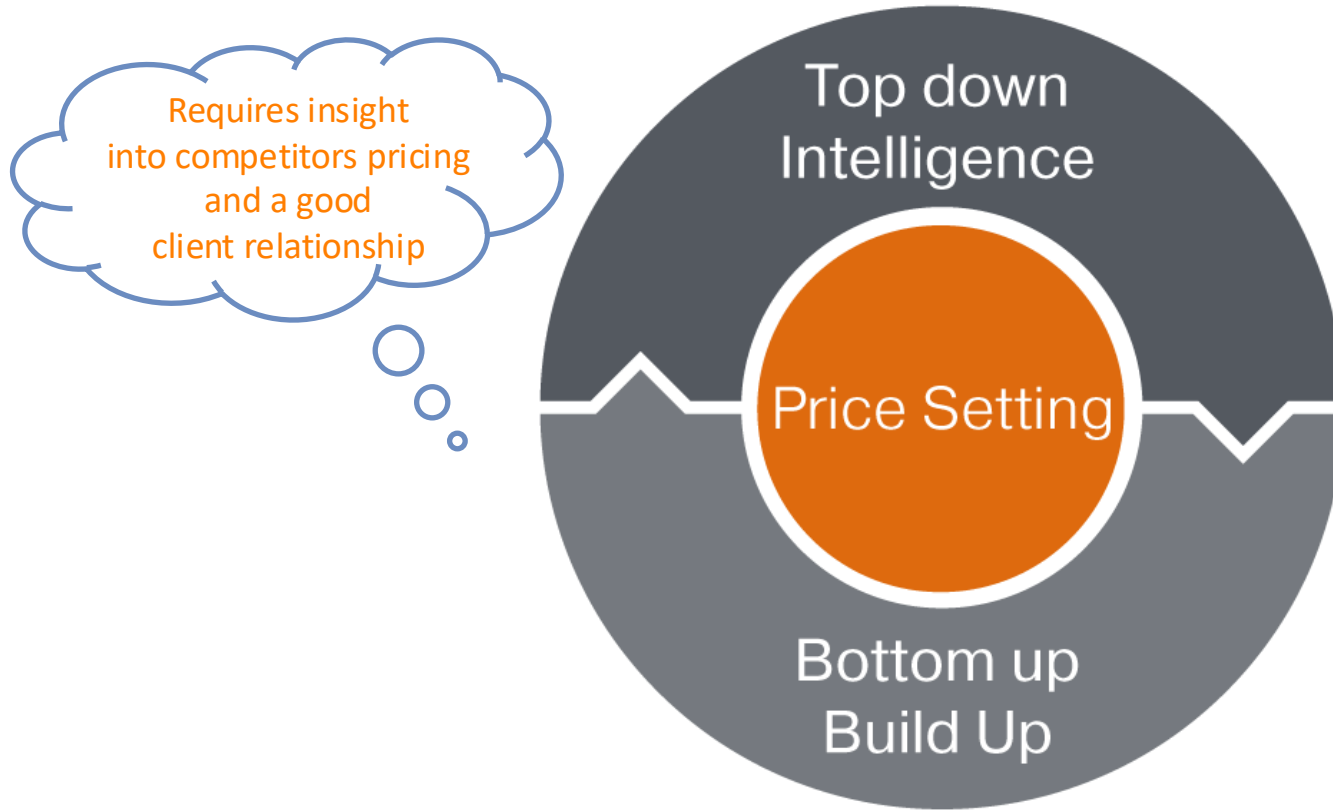
**Read it yourself and get someone else to
read it too**

Price



Disclaimer

- Every market is different. We cannot tell you how to price your proposals in detail. We can only provide an indication of general high level best practice in terms of approach that we have found to be useful
- Please ensure your commercial activities are undertaken by a competent person and reviewed and signed off by an appropriate signatory on behalf of your organisation.
- We can take no responsibility for your commercial approach, proposals or actions



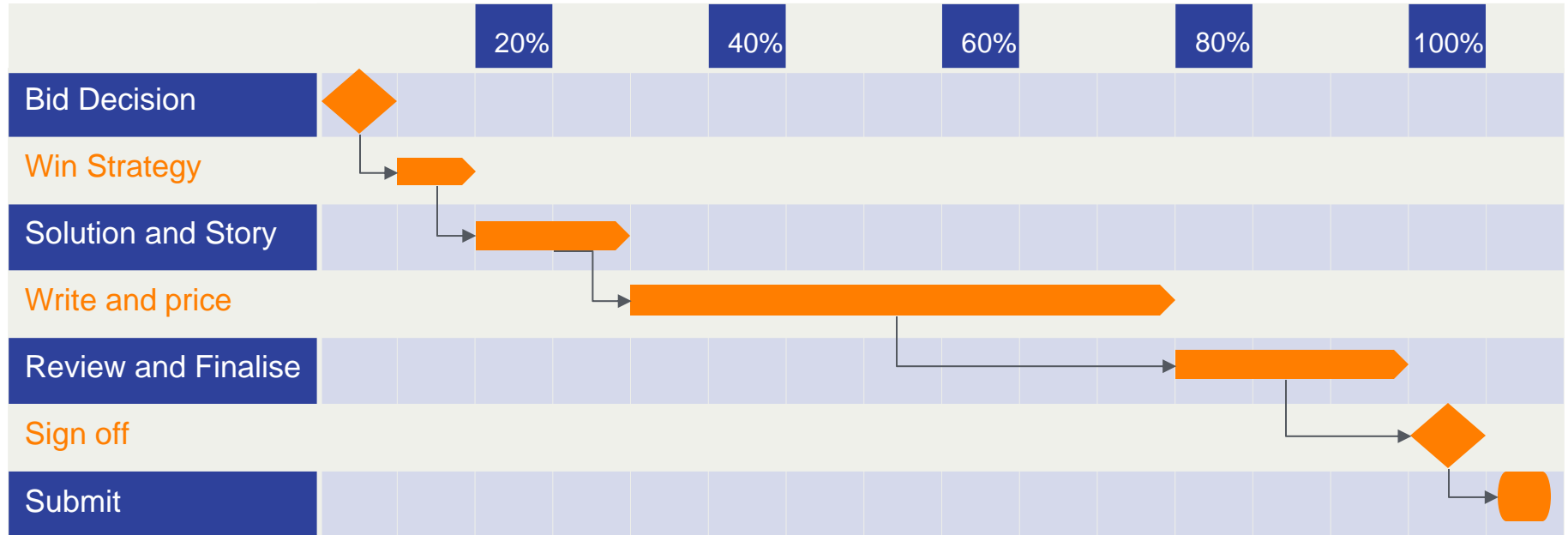
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Review and finalise

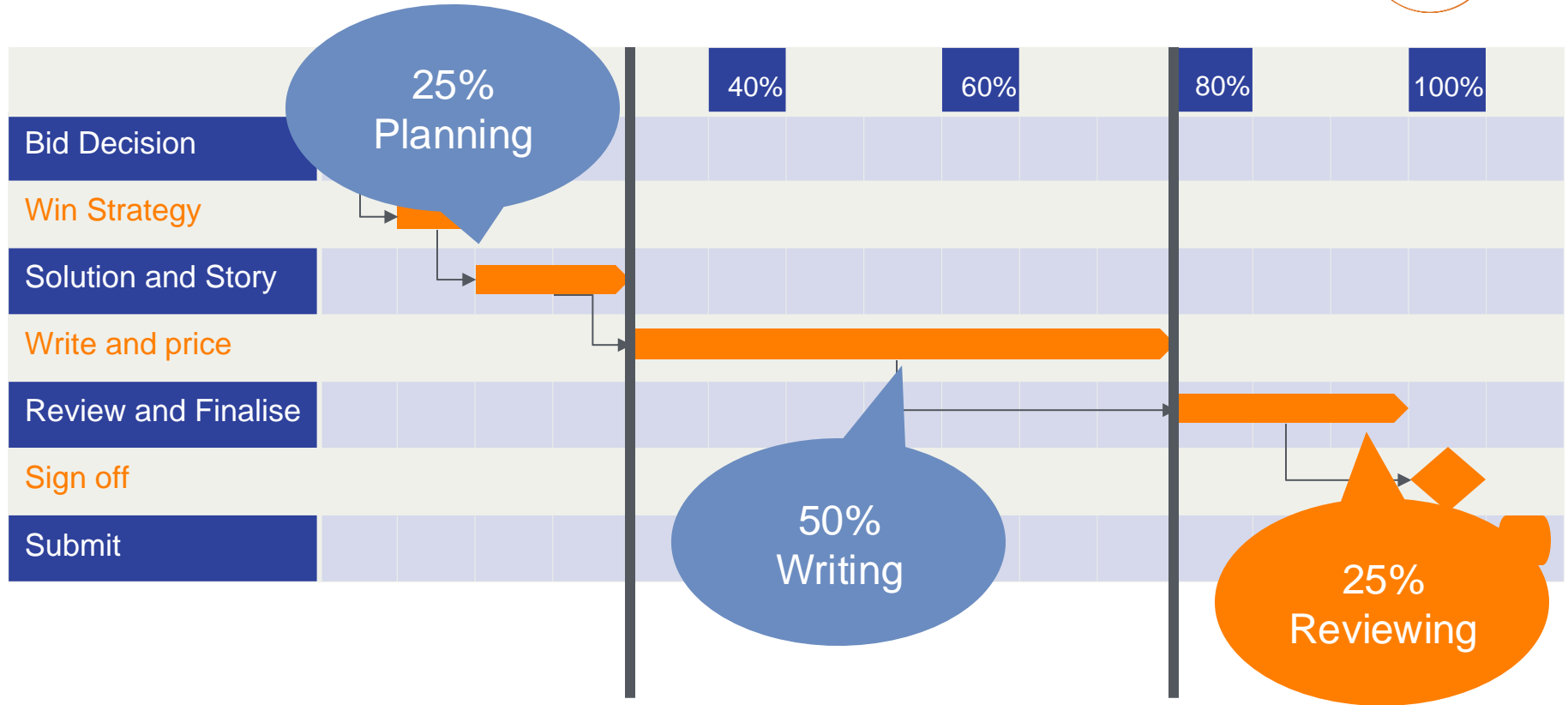
Phase durations

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Importance of planning and reviewing

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Review gateways

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25% Solution and storyboard review



60% First draft review



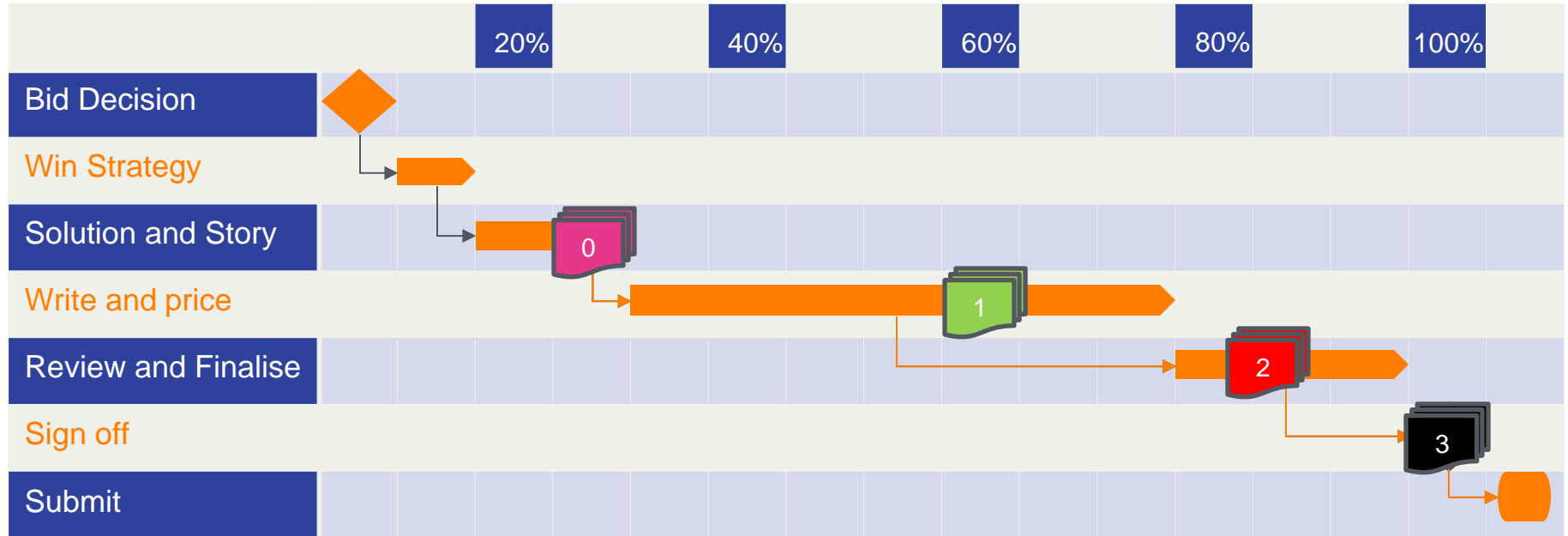
85% Second draft review



100% Final review and commercial close out

Review gateways

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Submit



- Assign responsibilities early
- Begin planning for production pre-bid
- Plan document production based on the document size and complexity and on your capacity and capabilities
- Consider outsourcing production
- Consider risks to delivery and contingencies
- Ensure version control
- Resist last-minute changes

Finalise the bid

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Distribute and take on feedback from 85% second draft review



Bid Leader allocates actions to contributors



Draw in additional resources or replace contributors if required



Make changes and close gaps



Final formatting by Document Publisher



Fact check



Image check



Spelling and grammar check

Editing text tips

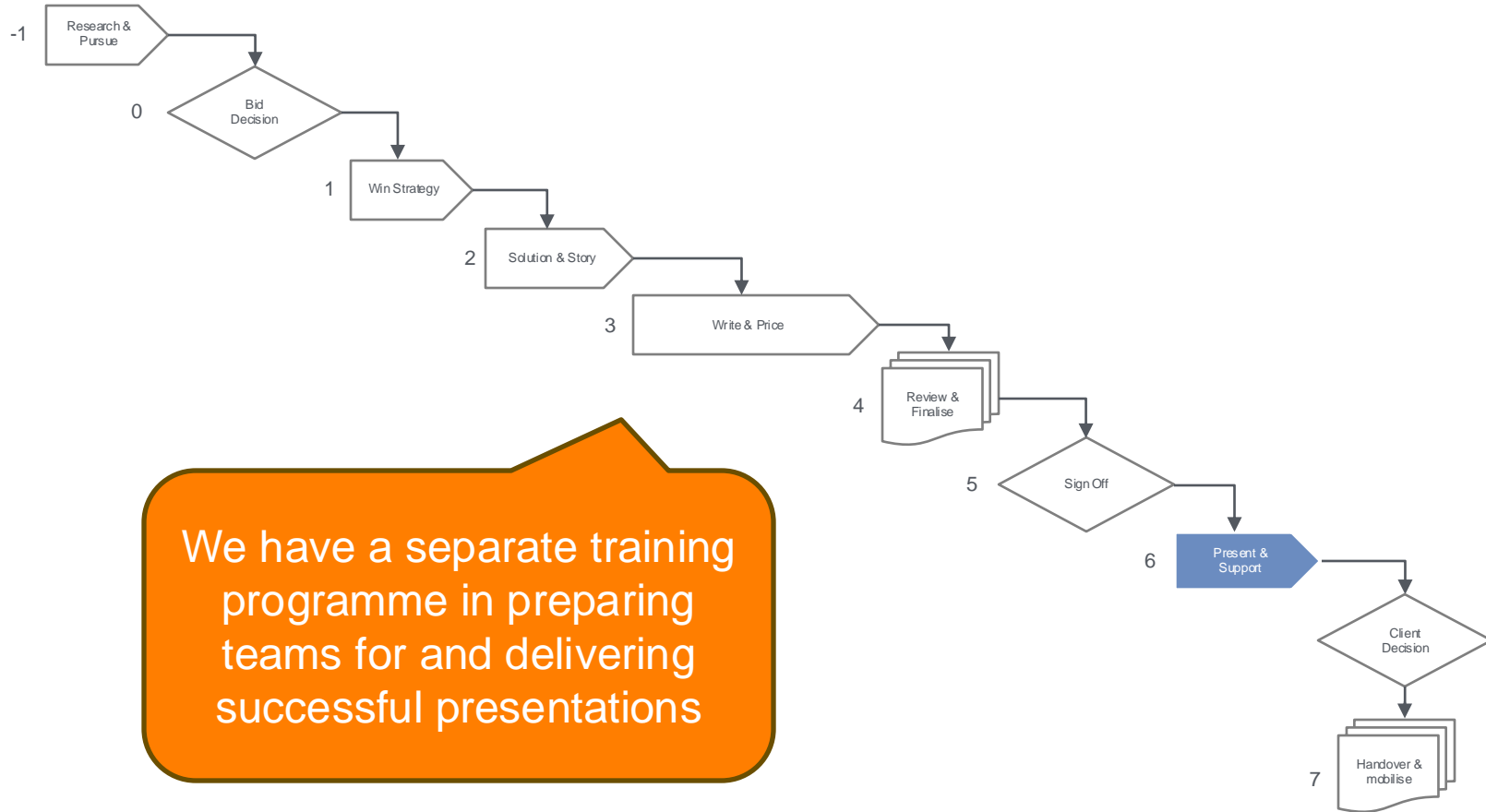


- Have you used headings and subheadings to signpost the response?
- Is there enough white space on the page?
- Are paragraphs five lines deep and five sentences long?
- Are sentences around 15 words long?
- Can you remove redundant words and phases?
- Have you avoided negativity?
- Have you used the clients language and an appropriate level of jargon?
- Does the response flow in a logical order?



Present and support

Separate Training Programme



Celebrate success!



- Always celebrate your successes

Summary





Any questions?

Wrap Up

- **Free Stuff**
 - the bid toolkit
 - Podcast: the red review with Jeremy Brim
 - Free Webinars and Drop in Calls
 - Linkedin Group
 - Email Updates and Top Tips

Bid Writing Masterclass Webinar Series starts on the 25th April.

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