



Fact sheet – Six more ways to reach bid and proposal Nirvana in quiet periods!

Introduction to six more things you might do*

As mentioned in the last fact sheet, many of us are still in a quiet period caused by the lockdown against the Coronavirus. And, as I said then, it's important that business life continues to develop, and this is no more important than in the world of bidding.

The last fact sheet dealt with six of the more obvious ways in which you could strive to achieve 'Bid Nirvana'! That non-existent place where everything goes to plan – which could be reached simply by saving time, getting some of those niggly things prepared **before** the next Invitation to Tender (ITT) or Request for Proposal (RFP) arrived!

This fact sheet aims to give you another 6 areas which will help you on your journey towards that state of Bid Nirvana!

The next six points to consider

As in the last fact sheet, these are areas that, from previous experience, always seem to cause tremendous anxiety during the proposal preparation process. They all have the usual issue; every one of them causes us to lose vital time during the preparation process.

Again, this list isn't exhaustive, and it's not in any order of priority. To keep it in context with the last podcast and to reflect the episode soundtrack, I have numbered the points from 7-12. Consequently, the next 6 areas that we will be looking at in this fact sheet are:

7. Competitor analysis
8. Review of sections that can lose you a bid
9. PQQ/SQ answers
10. Horizon scanning for new prospects

11. Capture planning and pre engagement process reviews
12. Previous proposals lessons learned review.

Competitor analysis

One area that often causes great concern in the proposal development process is competitor analysis. Significant amounts of time can be wasted trying to carry out a formal competitor analysis once a proposal development process is underway.

Organisations more adept at exploiting opportunities will have a process in place to do this early. Many will not.

During quiet periods, it's quite straightforward to review your past experiences with a view to identifying repetitive patterns in relation to competitors. For example, if you can see that there are several competitors appearing regularly, then now is a good time to analyse how they're likely to respond to future opportunities.

Such an analysis doesn't need to be very detailed at this stage. It can be no more than identifying a list of key competitors, together with their potential solutions that might come into competition with your own.

If you've identified an opportunity coming from the pipeline, then I would recommend that you use this basic analysis to war game how competitors might act. One way of doing this is to use colleagues in small teams. Maybe two could take on the role of a competitor to research and speculate how they might react. This can be done virtually, coming together to share results. If you can identify some generic hot buttons, the things that **really** matter to a customer, you might even take it to the next

stage where a Bidders Comparison Matrix (BCM) is developed.

There are some excellent hints and tips on preparing BCMs in *The Shipley Proposal Guide*, available [here](#) and *Writing Business Bids and Proposals for Dummies* available [here](#).

Review of sections that can lose you a bid

Most organisations will spend a lot of time describing in detail a technical solution to a customer's problem in their proposal. That's quite natural, of course, because a customer will want to know how you are going to solve a problem or issue. However, nearly all your competitors will achieve high marks in any technical solution put forward, because the customer is expecting this.

Unfortunately, there are some areas of a proposal which always seem to attract significantly less effort during the proposal development process than the technical solution. They just don't seem to be that relevant, important or attract high marks in the evaluation criteria. But, believe me, these areas can and will lose you a competition, if you don't answer them properly.

Hence, I call these the 'Quicksand Questions'!

Areas such as '**Describe the social impact of your solution**', '**Describe how your organisation deals with Corporate and Social Responsibility (CSR)**' and '**Describe the environmental impact of your solution**' etc. always seem to escape detailed scrutiny. As mentioned, these areas often have low marks attached to them in evaluation terms, but they can have a huge and disproportionate impact on the outcome. Ignore them or treat them lightly at your peril!

Look at previous examples from other ITTs that you have been involved in to gauge what sort of information potential customers are likely to ask for. Once you've identified these, start producing model answers for them. **Any** effort spent now will save you time during the next proposal preparation.

Never be frightened to think outside the box. For example, if you're looking at social impact in relation to a solution that you've often put forward, look at local authority or government websites to see what programmes they have in

place for things such as social regeneration, social inclusivity and so on. Start to compose answers around the general principles you find and mirror the language used on the sites. Chances are that, in the evaluation of a large and important public sector opportunity, a specialist will be engaged to assist in evaluation. Seeing familiar language and principles that reflect current policy, will help enormously.

PQQ/SQ answers

Pre-qualification Questionnaires (PQQs) and Selection Questionnaires (SQs) (sometimes referred to as Standard Selection Questionnaires (SSQs)) are part of the standard procurement process, particularly in the public sector.

We're all quite familiar with PQQs. The SQ has been developed to simplify the supplier selection process for businesses, in particular, smaller firms accessing opportunities in the public sector. In developing the SQ the opportunity has been taken to make the questionnaire compliant with the European Single Procurement Document (ESPD), which is currently in wide use across European procurement.

Essentially, all the documents ask for standard information used in the procurement process. Consequently, for most procurements, the information requested is pretty much the same from questionnaire to questionnaire. Things like company financial information, ownership details and previous examples of successful contract outcomes, always seem to come up. That said, PQQs have become very 'bloated' and they can ask for significant amounts of information, almost as much as that being asked for in a formal proposal!

The main message here is that all the standard information can be produced now. I suggest you put together a small team to review PQQ and SQ answers that have been submitted previously with a view to refining these and keeping them for future use. Bear in mind, of course, that care must be taken (as with all 'boilerplate' content) that information is checked prior to reuse to make sure that it's fit for purpose.

Lastly, I suggest you look at The Crown Commercial Service guidance [here](#). This

guidance will give you up to date advice to help you prepare the information.

Horizon scanning for new prospects

It seems an obvious thing to say that, during quiet periods, we should be horizon scanning for new opportunities, but we really should be! Now is the time to look at potential new sectors and markets ruthlessly, to see where future business might appear. Always remember that, even in quiet periods, procurement will still be going on somewhere out there.

I suggest you try to predict where new opportunities might happen in your specific sector and make plans to see if these areas can be exploited. Scan the general and sector press for ideas. Search the internet to get ideas of new opportunities. For example, you might spend some time looking at an identified area for exploitation and generate a plan to see if some pre engagement can take place. We'll look at this in more detail in the next section.

Again, the key message is to make use of the time now to see what might occur in the future; aim off and plan for it.

Capture planning and pre engagement process reviews

Leading on from horizon scanning, the whole area of pre engagement, or capture planning, is something that can be done now. The first thing to look at is, do you have a system for any form of pre engagement in your organisation? If you do have one, is it fit for purpose?

Most organisations have some method of collecting information about prospects, but many do not use a formal Customer Relation Management (CRM) software program to document and formalise the process. That said, purchasing a CRM isn't essential, you just need a process to capture information about a prospect as it occurs.

Taking that into account, it may be possible to look at potential prospects now and start to document contact matrices, developing simple action plans with your colleagues to gather more information during this time.

Lastly, don't forget to consider some of the assets that you can create to pre engage more effectively. For example, you could consider

developing some **White Papers** to send to prospects, letting them know about some aspect of your operation. Some organisations are now producing Vlogs, Blogs and Podcasts to send general and specific information to customers. Others, particularly those in organisations that manufacture 'things', large and small, are sending out 3D printed models of things like pumps, valves, components etc. Of course, don't forget to look at your social media plans to help with pre engagement.

There are some excellent hints and tips on capture planning in *The Shipley Capture Guide*, available [here](#).

Previous proposals lessons learned review

Generally, once a bid has been submitted, there's usually a huge sigh of relief and teams want to move on to the next challenge. However, organisations that want to improve their proposal development processes *always* make use of lessons learned from previous experiences. It's important to look at losses as well as successes.

Hence, it's generally accepted that there are three times when you can learn lessons from a previous bidding experience. First, the internal lessons learned review; how was the experience for everyone in the team when getting this bid or proposal prepared? What can we do to improve things next time? Next, it's when you lose a bid and you receive feedback from the customer as to where and why you didn't win. And Lastly, it's when you win something. Most organisations will feel more comfortable about giving you feedback if you've won something! That said, never underestimate the idiosyncratic nature of public procurement feedback systems. You might not get back what you were expecting!

Here, my advice is be persistent and don't fall into the trap of thinking that you will upset an awarding authority by being so. Don't give up and try to get some meaningful feedback.

Consequently, now is a good time to look at previous wins as well as losses in some detail.

Look at the following areas:

- Did you capture the lessons learned from previous bids? Did you circulate these?
- If you were successful, why did you win?
- Did you answer the questions fully and correctly?
- Were the pictures and graphics fit for purpose and did the action captions give the key messages in the section of the proposal?
- Were Value Propositions (VPs) effective for the key message you were trying to get across? **
- Were headings informative, rather than just one liner telegraphic?
- Did the proposal flow, making use of the customer Hot Buttons (HBs) that you might have identified early in the process? Indeed, did you identify HBs?
- Did you have previous engagement with the customer? It may be that you managed to have good engagement with the customer in your winning bids, and poor engagement in the losing ones.

Summary and some last thoughts

As mentioned in the last podcast and fact sheet, nobody likes to be in a quiet period in the business world! But look upon these quiet times as a real opportunity to identify and prepare those frequently used proposal elements that will make life easier next time.

Be persistent and dogged in the approach to root out these areas and, of course, others that you and your colleagues will identify, to prepare for the next ITT/Rfq. By doing this, you may just reach your version of Bid Nirvana!

If you do want to look at some of these areas in more depth, then you might want to read some of the many publications out there about bid and proposal development. There are certainly plenty to choose from!

As mentioned already, there are some excellent hints and tips on preparing proposals, and further amplification of some areas I have been discussing in this podcast, in *The Shipley Proposal Guide* available [here](#) and *Writing Business Bids and Proposals for Dummies* available [here](#).

If you are interested in taking your professional life further in the world of bids and proposals, then I suggest you consider joining the ***Association of Bid & Proposal Writing Professionals (APMP)***. Further details of membership and professional development can be seen at their UK website [here](#) and at their USA website [here](#).

Good luck and, as always, keep bidding!

*See the fact sheet that accompanies the podcast 'Six ways to reach Bid Nirvana in quiet periods' for the first six areas.

**We'll be looking at VPs in more detail in later podcasts.