CREATING WINNING BIDS AND PROPOSALS
Hints and tips to help you win more business!

Fact sheet – Time planning for bid and proposal development

Why do we need to think about time planning during bid and proposal development?

A bid and proposal development plan is very much like a project plan. Just as you would in a project, you need a plan to develop a proposal in response to an ITT/RFP. The proposal development plan needs to consider the delivery date of the proposal and work up plan to meet that delivery date.

Those of you who've had experience in project management, will find the proposal development planning process very similar, with a list of activities being completed along a timeline.

Those of you without this type of experience will find the process very straightforward, once you have worked out a basic timeline and a list of activities to complete along the way. Remember, of course, that many activities can be completed concurrently.

Hence, knowing the times that some of these activities are likely to take will help make the planning process much easier.

This podcast and fact sheet look at some hints and tips to help you with time planning so that you can you create winning bids and proposals!

Before you get it, what activities will have taken place before the ITT/RFP is released?

Because you've already had excellent customer engagement, you should have already looked at areas like the competition and whether you are going to bid, or not, in detail. This will be briefly mentioned in this fact sheet together with some planning time considerations, but not in any detail.

We've already discussed the area of early customer engagement in another podcast and fact sheet. * If you've had early customer engagement, these two activities of competitor analysis and bid/no bid should be relatively easy to complete. Always assuming, of course, that you have the right people on hand to help. **

What's the first thing you need to do when the ITT/RFP arrives?

Once an ITT/RFP has been issued you will be able to work out the timeline for the actual proposal development in detail.

But, before you do that, you'll need to carry out a search of the documentation you've been sent, to work out what you need to produce for the customer…and by **when**. You'll often hear this process being referred to as '**stripping the bid**'. Here, you go through the documentation carefully by looking for key words like 'must', 'must not', 'will', 'will not', 'shall' and 'shall not' etc.

If the documentation is digital, then this word searching – *stripping* - is straight forward. But sometimes, you may find yourself using more traditional methods like highlighting or underlining the key words, if the documentation is in hard copy format!

The main output from this activity is establishing exactly what the customer wants by following their instructions to the letter, and by so doing, being **complian**t with their instructions and requirements. Some bid teams develop a table from this activity – a **compliance matrix** – to make sure that nothing is overlooked during proposal development. ***

Other key outputs, of course, include information like the time that the proposal needs to be delivered. It may also highlight other bits of key information, such as how the proposal is to be organised, what fonts (and size of font) to use and any other 'production'

constraints, such as word counts, positioning of extra information in appendices etc.

Using the deadline given for proposal delivery to work out a proposal development plan

Once you have the deadline for delivery, you can work out a plan for production of the proposal.

Start by using the proposal delivery date – the deadline, often called the **'drop dead date'** - and work backwards along a timeline to schedule key activities, such as kick off meetings (where the proposal production team is briefed), authoring tasks, graphics production, and so on.

Again, remember that these tasks and activities can be scheduled in parallel; they don't need to be completed in series. Concurrent activity is very much a key principle of a proposal development plan, the use of which will ensure the best use of the time available.

What are the key activities that need to be planned for and how long does each take?

Obviously, this can't be a definitive list, but here are some key activities that will need to be planned for during proposal development:

- Stripping the bid
- Start up and planning before the kick-off meeting
- Kick-off meeting
- Producing new text
- Producing simple graphics with action captions
- Producing complex graphics with action captions
- Reviewing new material, including graphics and photographs with captions
- Adapting **boiler plate** material (pre-used copy/graphics/photographs etc.)

- Final review, amendment and proposal production (if necessary)
- Other reviews along the way. These may include content planning reviews, document readiness reviews and lesson learnt reviews
- Printing, binding, or uploading to customer portal
- Contingency time.

Most of these activities can be planned for by using a set of average planning times. To help you plan your own proposal development production plan, I have produced a table showing some average planning times. It's attached to this fact sheet at Annex A.

Figure 1 below shows a very simple example of what a proposal development time plan might look like.

There are some more excellent hints and tips on proposal development processes and principles 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 *Early customer engagement to create winning bids and proposals – Part 1&2*
** We will be looking at bid/no bid decisions and competitor analysis in more detail in later podcasts.
*** We will be looking at the process of *stripping the bid* and *compliance* in a future podcast.
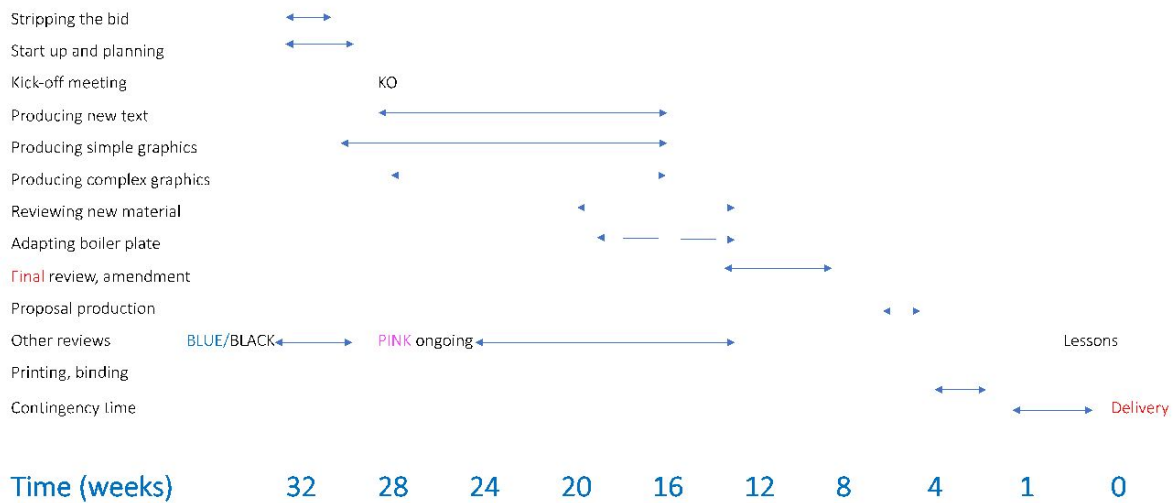
Simple example of a proposal development time plan

Activity										

Stripping the bid

Start up and planning

Kick-off meeting   KO

Producing new text

Producing simple graphics

Producing complex graphics

Reviewing new material

Adapting boiler plate

Final review, amendment

Proposal production

Other reviews   BLUE/BLACK   PINK ongoing   Lessons

Printing, binding

Contingency time   Delivery

Time (weeks)	32	28	24	20	16	12	8	4	1	0

Figure 1: *Simple example of a proposal development time plan, showing how key activities might place over a 32-week cycle.* The Blue and Black reviews normally take place well before kick-off but will still influence ongoing thinking up to then and beyond. The Pink Review is shown as ongoing, but these will normally be a series of reviews, usually held with specific authors.

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Annex A to Fact sheet - Time planning data for bid and proposal development

Serial	Activity	Planning times	Remarks
1	*Stripping the bid* to determine what you must do to meet customer's instructions and address general compliance issues	Depends on the size of the documentation. If ITT/RFP is hard copy, allow 50 pages per person per day to scrutinise	Quicker if ITT/RFP is digital. If so, use a word search for active words, such as 'will', 'will not', 'must', 'must not' etc. If hard copy, use highlighters, underlining etc. I suggest making a table of requirements
2	Start up and planning before the kick-off meeting	Allow 10-20% of the total time as a guide figure	Can take longer if you need/want to involve several third parties; partners, supply chain etc.
3	Kick-off meeting	Allow average time of ½ day. Longer for complex opportunities	Involve SMT, to set tone. As a minimum, come prepared to show contributors overall proposal strategy, what's expected from everyone and timings to complete
4	Producing new text	6-8 pages per day	Experienced authors may get to 10 pages per day. Can take longer if not planned with outline frameworks and strategy guidelines
5	Producing simple graphics with action captions	1 – 2 hrs each graphic	Plan early in the process. Ensure relevance and that correct type of graphic is used
6	Producing complex graphics with action captions	2 – 6 hrs each graphic	As per serial 5. This planning time can also apply to photographs
7	Reviewing new material (including graphics and photographs with captions)	40 pages per person per day	More experienced reviewers may get to 50 pages per day
8	Adapting *boiler plate* material (previously used copy/graphics/photographs etc.)	20 – 40 pages per person per day	Ensure complete relevance. Check content very carefully
9	Final review, amendment and proposal production	Allow 10-20% of the total time as an overall guide figure. Plan on 40 pages per day per person for final reviews	Plan final review early. Set a firm date and advertise widely. Plan hard copy production as separate activity
10	Other reviews along the way (including content planning reviews etc.)	Plan to fit into an organisational process (if you have one). *See also serials 13 -17 below*	Make more efficient by involving only relevant people e.g. specific authors for specific sections
11	Printing, binding, or uploading to customer portal	Depends on the size of documentation. For portal uploads, you may be able to upload sections as they are completed	Don't leave portal uploads to the last minute. This causes stress! For hard copy, allow time to check completeness, packing and delivery
12	Contingency time	Allow 10% of the total time as a guide figure	Don't use contingency for activity such as printing
Additional review planning times/suggestions [1]			
13	Bid win strategy review (often called the Blue Review)	Between pursuit decision and bid decision to 'go' or 'no go'	Should always feature as part the bid/no bid decision discussions
14	Competitor strategy review (often called the Black Review)	Between pursuit decision and bid decision to 'go'	Should always feature as part of the bid/no bid decision discussions
15	Content planning review (often called the Pink Review or Storyboard review)	At sensible times soon after bid decision is made to 'go'	Should feature in kick-off meeting and throughout development
16	Document final readiness review (often called the Red Review)	Must be planned early and remain as a fixed date. (See serial 9). 40 pages per person per day	Can be concurrent with a business case review (often called the Gold Review) using different colleagues
17	Lessons learnt review (often called the White Review)	After proposal submission. Second lessons learnt review possibly after win/lose decision by customer	Can feature at the kick-off meeting, using previous lessons as a guide to the current approach for proposal development

[1] I've used terms here that are often attributed to Shipley. That said, these descriptive titles (or organisational variations of them) are now very widely used in industry best practice review timetables.

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