



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

Introduction to things you might do

At the time of writing this fact sheet, many of us are in a quiet period caused by the lockdown against the Coronavirus. That said, it's important that business life continues to develop, and this is no more important than in the world of bidding.

Those of us who work in the frenetic world of bidding, know only too well that, once the pressure is on, we often wish that we had been more prepared. Much of this surrounds the whole area of saving time. 'If only we had more time' is a common thing you'll hear when you're up against a tight deadline.

Consequently, this is exactly the right time to start thinking about those areas where you can prepare a whole host of things that will save you time during the next proposal preparation. I like to think of this as aspiring to achieve '**Bid Nirvana**', where time is always on your side and everything goes to plan! Some of you will have heard me use that phrase before.

That said, those of us who have been doing this for a long time, know that this state of bid Nirvana rarely exists! But we can do many things that will ease the pressure in future bids.

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

The six things to consider looking at

I have taken 6 areas that I know, from previous experience, always cause tremendous anxiety during the proposal preparation process. The one thing in common with all of the areas is that every one of them causes us to lose vital time during the process.

Although the list isn't exhaustive, and it isn't in any order of priority, the 6 areas that we'll be looking at in this fact sheet are:

1. Case studies development
2. Graphics planning and preparation
3. Picture planning and preparation
4. Reviewing the bid process in your organisation
5. Statistics and data to support past performance
6. Style guides to encourage authors to follow some basic rules.

Case studies development

Perhaps out of all the areas, this is the one that causes most angst amongst contributors to a proposal preparation. That said, I never really understand why, because in every proposal that I've put together, in response to a formal invitation, I've always been asked to produce some case studies. Additionally, we always strive to use previous examples to demonstrate our capability; evidence of what we can do. These all take time to produce.

Hence, preparing a series of case studies up front is, perhaps, an obvious way to prepare for the next proposal preparation and save time.

The key to producing relevant and sensible case studies, is to look at your overall business offer and previous work. Then, predict key areas where you recognise a potential customer might have great interest relating to your capability. In other words, think of the examples in your business operation and previous delivery that you believe will give a future customer confidence in you, so that they will choose **you** for a task. After all, you want to win!

The best way to produce case studies is to follow the STAR model; Situation, Task, Action, Result.

Briefly describe the background situation, what you were tasked to do, what action you took and what the result to the customer was of you taking that action. Keep things simple and to the point. Punctuate the text with relevant pictures or graphics as necessary, remembering to give each an action caption of a figure number, a decent informative heading and the key message in a few sentences.

Additionally, if you can get a quote from the previous customer that you did the work for, then so much the better. This can be used to give confidence to the reader because it's a third party talking about you. If you are using callouts in your layout style, customer quotes work well here. A tip is that you can often get customers to agree a set of words that you write for them!

If you produce half a dozen case studies now, this will save you a great amount of time during the next proposal preparation.

Graphics planning and preparation

You will often find, when you're putting a proposal together, that the same graphics will come up time and time again in **some** sections. For example, things like Production Flow, Management Process, Complaints Resolution Process, Quality Control Process, and so on will come up regularly. Consequently, if you can produce some of these now, a huge amount of time can be saved, potentially. Remember, complex graphics can take up to six hours plus to produce and even the simpler examples will take two or three hours.

Consequently, one of the best ways to approach this is to review your own past proposals, customers' Requests for Proposal (RFPs) and Invitation to Tenders (ITTs). Make a list of the graphics that have previously been asked for and those used by you and the key points they were putting over. Additionally, review the text in some of your previous proposals to see where a graphic might have replaced the text.

In fact, you'll be surprised to see what does come up regularly and how often text could

have been saved by using a graphic in some of your responses. Once you have a list, then work out which graphics will **not** change. The reason for making this point is that some may change quite subtly from proposal to proposal and 'standard responses' could creep into a future proposal without being fit for purpose; always an area for concern and you **must** guard against this.

Once you have a list of 'graphic contenders', spend time drafting them in a rough format. I usually sketch out my new graphics in rough, using a pencil and paper! I try to draft an action caption too. Then, if possible, share ideas with your team and get input from a wide range of colleagues. I've been doing this recently via Dropbox and online discussion groups in programs such as Teams, Zoom and so on. It works!

Having compiled some good drafts, try to get a finished article produced, complete with an action caption. Test it out and, if it seems to work, store it for future use.

Picture planning and preparation

Many of the same principles apply to the creation of pictures too. When you review your previous proposals, ITTs and RFPs, you may end up with a 'feel' of where the use of a picture could have enhanced your submission, where a visual interpretation could have made your position stronger or could have saved you text. Visuals, of course, are particularly useful in any Case Studies you may have planned.

The crucial point about picture creation is that these should **never** be just 'eye candy', something that is just pleasing to the eye. The picture, with its action caption, should put across a key message and, rather like a graphic, stand alone in putting the message across.

Hence, once you have identified some areas where you think a picture could be/could have been used, spend time interpreting the main message visually. Ask yourself 'What is the message I want to show here?' and then 'What picture could I use to show this?' This process isn't as easy as it sounds, but if you discuss your ideas with colleagues, you will come up with some good ideas.

Once you have a list of ideas, you may find that the capture of the images will need to be stage managed, taking particular care with things like professionalism of people being photographed, corporate branding, Health & Safety (H&S), correct PPE usage and so on. There's nothing worse than seeing a great image showing a key message, being undermined by poor H&S practice or someone who looks as if they don't want to be there!

Reviewing the bid process is in your organisation

Most of you will have a process to follow when you're putting proposals together. This may follow a set procedure from identifying the opportunity, receipt of an ITT/RFP and other processes to take you right through to the delivery of the completed proposal. You'll probably have gates and reviews already planned in the process to ensure that the proposal is put together in a way that achieves maximum success.

Of course, some of you might not have any of this in place, and some of you that do, might feel that the process isn't working correctly. So, now is a great time to either develop a 'bid process' or review and update the current one.

If you don't have one, think about how you might plan a process to take into account all of the things that occur during the preparation of a proposal. I would suggest that you write a list of all the activities that you know will occur during this process, and then try to develop some form of flow that considers all of the activities. Try to put a time scale against this process too. That's easier said than done, but if you play around with the list of tasks and allocate times to complete against each, you can start to think about when these activities might take place during a normal proposal development process. What you're after achieving is the creation of a process that will develop a proposal along a planned timeline.

Those of you who do have a process in place, take some time to review it thoroughly. Did it work last time? Are there any times along the process that you know will always cause an issue during the development of a proposal? If you can come up with the list of things that

need to be changed or refined, then now is the time to do it.

For example, a lot of organisations find the final document review process to be fraught with complications. Senior management, who always want to become involved towards the end of a process, never seem to be available when you want to complete the final review! Could it be, therefore, that the process is wrong? These are the sort of areas that you can spend time on now to refine them.

Once you've either put a new process together, or you've reviewed the current process, take some time to share your ideas with your colleagues to ensure that they buy into the process or changes. Of course, they may see things that you've missed.

Statistics and data to support past performance

Another area that takes a huge amount of time to put together during proposal preparation, is the development of statistics or data to support past performance. It's a bit like developing case studies. If you can spend time doing this now, you will save a lot of time during the next proposal development.

The sort of things we are looking at here are those statistics and other data that show how effective your organisation is in a particular process or production cycle. For example, you may have implemented a solution that made a huge impact on one of your previous customers. If you can quantify this impact numerically, giving statistical evidence of what difference your solution made, then this becomes a very powerful tool to bring into the next proposal.

The way to approach this is to look at all of the previous solutions you've executed, particularly around production and implementation, and make a list of where you think statistical evidence would make your case to evaluators more compelling. You may find that once you start this process, more ideas will come to mind that can be treated in the same way.

Once you've come up with some data, you might find that some of the evidence produced would lend itself to being shown in a graphic, as described above.

One last point is that you might consider using a third party, such as an academic or an academic institution, to help you develop data. This has two good things going for it. First, an academic will probably think of different ways to research, collect, collate and produce data. Secondly, a third party, particularly from an academic institution, will add great credibility to the information that you are showing in future proposals.

Style guides to encourage authors to follow some basic rules

Using style guides will literally save huge amounts of time in proposal preparation. Think of the times when you have produced a proposal and how many people are involved in authoring it. Harsh experience shows us that every author will have their own Idiosyncratic ways of dealing with things like punctuation, abbreviations, acronyms, layout and so on.

Of course, at the end of the production process, someone has to examine the document meticulously and standardise all of the dissimilarities. In short, this can be a nightmare and cause you hours of time to put right!

If you can produce a style guide that will tell authors how they should approach these areas, and you can encourage everyone to follow the conventions, you'll be amazed at how much time you will save towards the end of the proposal development process. Of course, this is normally the time when that particular resource seems to disappear quite quickly!

One small area to be aware of, however, is that some conventions change from proposal to proposal. For example, customers' names will always be different, and some customers will follow different conventions. Naturally, it's imperative to use the correct customer's name, but it's always good practice to try and mirror the customer's writing and style conventions in the proposal they are reading. Hence, you may need to 'tweak' a standard style guide from proposal to proposal.

Summary and some last thoughts

Nobody likes to be in a quiet period in the business world! That said, if you do find yourself

in one, it's always sensible to make best use of the time available to improve your proposal development processes. That's very easy to say, of course, but remember, in the bidding process, time is **always** against us and anything you can do to make that situation better has to be a good thing.

The list of things I've given you isn't exhaustive and some of you will have other ideas to look at on your journey to reach your own Bid Nirvana! However, the aim of this podcast and fact sheet has been to stimulate you into thinking about those areas that can be worked on now, so that bidding life might be easier in the future.

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!

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 keep bidding!