

# BQ

BIDDING QUARTERLY

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# GOOD PRACTICE V BEST PRACTICE

WHEN DO  
YOU ROLL  
THE DICE?



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# FOREWORD

What does good practice or best practice mean to you? This was the question I posed to the BQ panel of global experts and guest writers for this issue. It's a question I have grappled with for many years and yet, having read the 19 brilliant contributions that make up BQ14, I'm left with more unanswered questions than the one I started with.

When you think of best practice, do you think of a tried and tested process? Is it a set of standards everyone in your business or profession adheres to? Is it a system, a set of guidelines, or maybe the application of specific skills? Perhaps it is an external benchmark such as the Shipley Guide or the APMP Body of Knowledge? Is best practice something you observe, aspire to, or envy in your competition? Our authors raise (and answer) these questions, and many more.

If I can encourage you to read any BQ edition from cover to cover, this is the one.

**Jon Darby** makes a strong case for why the British Standard being funded and developed by APMP UK will positively change the bidding landscape. The standard may eventually be adopted globally – will this become your ultimate standard and best practice?

**Rick Harris** talks passionately in his article about the importance of research in the process of developing standards and best practice.

**Nigel Dennis's** brilliant article introduces 'Maximum Possible Product' as one form of best practice and emphasises how the right behaviours must be front and centre of any approach.

**Holger Garden** talks about the essential ingredients for creating an 'impact' with your proposal writing, something our BQ procurement specialist **Beth Wallace** confirms is often the differentiator when selecting the winning bid. Beth's own article explains that best practice can be as simple as saying no, and why she respects organisations more for not wasting her time.

Even international dictionaries don't agree on an official definition of best practice. **Rita Mascia** introduces her concept of 'next practice' – turning the status quo on its head.

One common theme running through this edition is the level of constraint people feel standards and best practice impose on them. Some feel almost suffocated by them and believe they are the nemesis of creative thinking. **Pippa Birch's** fantastic article talks about the challenges of adopting 'accepted' best practice in smaller companies with limited resources and how you can be successful by actively escaping its shackles.

Many successful salespeople I've worked with don't follow a specific standard, process, or set of guidelines. The best I've worked with often struggle to update their pipeline on Salesforce. So is best practice about adapting to our clients' needs and ultimately solving their problems? Will having a set of best practices and standards in bidding endear us to our sales colleagues (our most important customer in my opinion) or ultimately just create more of a 'them' and 'us' culture? **Joe Riley's** article highlights the importance of 'strategic capture' as part of the bidding process.

Best practice typically requires everyone involved to perform at a 100% - any weak link or overworked person will dilute the outcome. **Carl Dickson** superbly points out how 'proposal friction' will result if the team doesn't share the same goals or priorities regardless of process or standards. This is echoed by **Chris Kaelin** who emphasises the importance of assigned roles within every team.

Perhaps your organisation (and maybe even you) only ever follows 'good practice'? Why expend extra effort when good is good enough? **Jon Williams** talks about the evolution of our profession, how we have reached 'Bids 2.0', but also about how our journey is far from done.

The secondary theme of this issue is "The Good, The Bad and The Ugly". I ask every new client for an example of 'The Good' – a proposal they are really proud of and which showcases their approach to winning business. Then I ask for an example of 'The Bad' – a proposal that was so poor it should never have left the building. Finally I ask for an example of 'The Ugly' – proposals which, in my experience, make up the largest share of an organisation's responses. They are frequently the last-minute ones where something, anything, has to be submitted to the client. I know all of you will have experience of working on good, bad, and ugly deals, as related in articles by **Alison Zalecki, Nora Navin** and **Mike Reader**.

With finite bid team resources, it's impossible to apply best practice to every deal. How do you decide which deals receive the best practice approach, versus those where perhaps

'good practice' is good enough? Hence, when do you roll the dice? The 'when' could easily be substituted with 'how' or 'if', and of course there is a big question about 'who' has responsibility for rolling them. **Andy Haigh** and **Anna Maysey-Wells** address these questions in their articles.

Standards and best practice feel like an obsession across our profession right now. The exponential growth of our profession in the past five years is testament to the strategic importance companies now place on bid and proposal management. **Ceri Mescall** rightly points out that each one of us has a part to play in evolving our profession. **Tony Birch** – one of the world's leading authorities on best practice and standards in bidding – offers 20 brilliant approaches you can put into practice today.

However, what we think about good or best practice should always be secondary to what the recipients of our proposals think of our work. **Mike Parkinson** explains how client biases and preconceptions about us can be successfully overcome.

For me, best practice in bidding is often as simple as following a common sense approach. It is always implied that best practice standards will lead to improved performance, but where is the independent research?

Ultimately, everyone has their own beliefs about what best practice is or should be – as demonstrated in this issue of BQ. Which articles align with your beliefs? Which articles make you question what you thought you knew about best practice? Please do let me know your thoughts.





# IT'S ABOUT TIME BIDDING HAD STANDARDS

JON DARBY

The new consensus-based global standard for the bid and proposal industry will be led by the British Standards Institution (BSI), sponsored by the Association of Proposal Management Professionals (APMP) and authored by BidCraft. The standard will be shaped by diverse stakeholders, making it representative, inclusive, and freely accessible to everyone globally.

**Tell us about the standard, how it came about, and why it's needed**

Bidding is big business. Government and industry award contracts worth billions every year through competitive tendering and organisations spend huge sums of money bidding to win these contracts. Yet there are no standards to guide this process, which risks sub-optimal outcomes and inefficiencies.

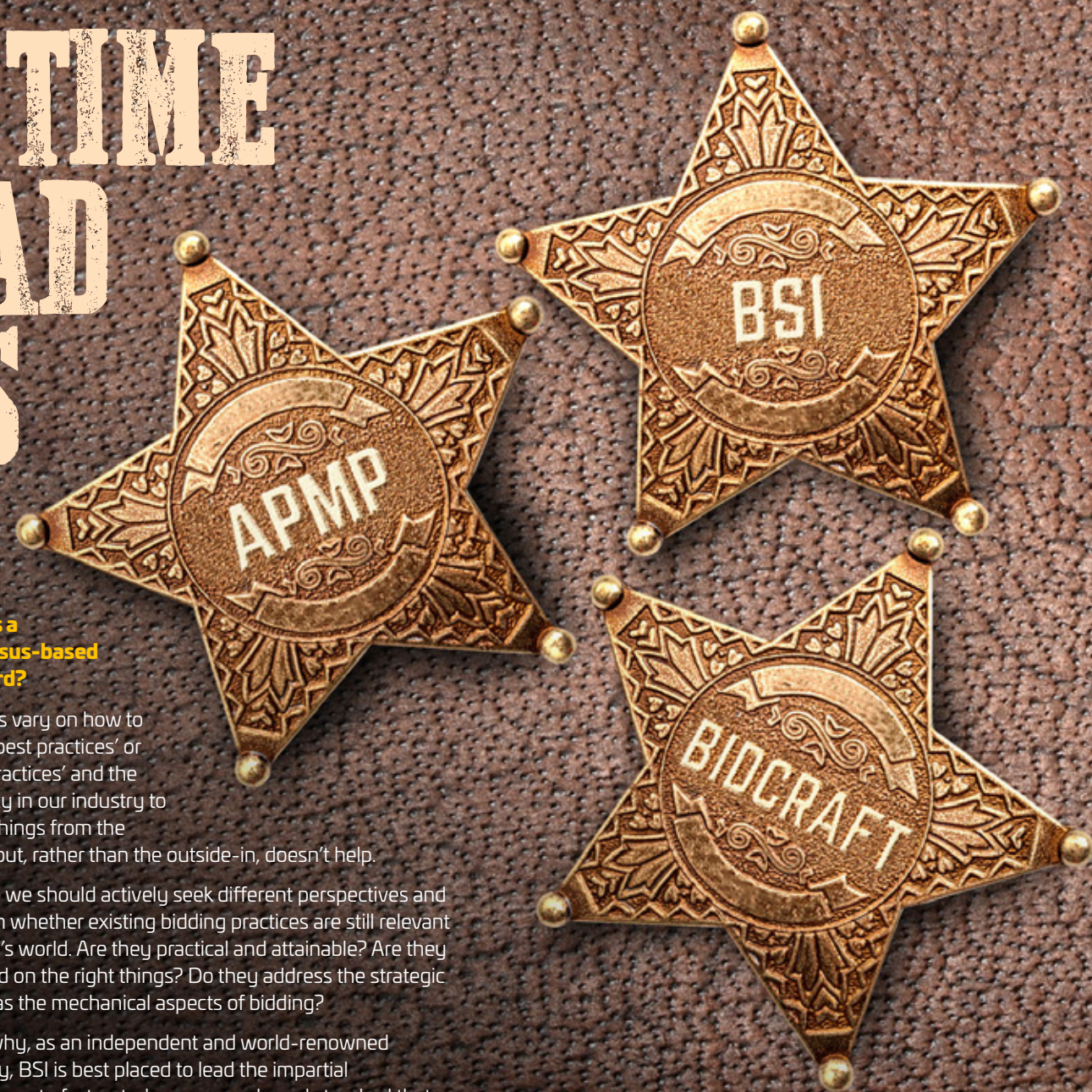
That's where the idea for a global industry standard came from. If standards exist for quality assurance the world over, why shouldn't they exist for bidding?

**What is a consensus-based standard?**

Opinions vary on how to define 'best practices' or 'good practices' and the tendency in our industry to look at things from the inside-out, rather than the outside-in, doesn't help.

I believe we should actively seek different perspectives and question whether existing bidding practices are still relevant in today's world. Are they practical and attainable? Are they focussed on the right things? Do they address the strategic as well as the mechanical aspects of bidding?

That's why, as an independent and world-renowned authority, BSI is best placed to lead the impartial development of a trusted consensus-based standard that will be freely accessible to everyone around the world.



The term 'consensus-based' is important. The standard won't be a single company's proprietary view of bidding practices. It will be shaped by a broad group of diverse stakeholders who have a closely coupled relationship to bidding, including:

- Central government
- Local government
- Associations
- Private companies
- Management consultancies
- Sales organisations
- Charities/Not-for-Profits
- Procurement specialists
- Project management specialists
- Professional bodies
- Academia

Think about this list for a moment. Many Bidding Quarterly readers will be working for, or bidding to win business with, these stakeholders. Meanwhile, these same stakeholders will be helping to develop the industry standard. That strikes me as being a virtuous circle.

**Who is BSI and why is the UK leading on this?**

BSI is appointed by the UK Government as the national standards body and holds the Royal Charter. It represents UK interests at the International Organization for Standardization (ISO), the International Electrotechnical Commission (IEC) and the European Standards Organizations (CEN, CENELEC and ETSI).

Once a standard is developed by a national standards body like BSI, any of the other 167 national standards bodies around the world (the American National Standards Institute, for example) can adopt it. They don't develop their own standard if one already exists somewhere in the world. This means the standard starts in the UK under BSI, with the understanding it will be adopted globally. The intention is for it ultimately to then become an ISO standard.

**How will organisations be able to adopt the standard and how will it benefit those that do?**

Any and every bidding stakeholder (from micro-companies to multi-nationals or grant chasers to government teams) will be able to adopt the standard.

Taking businesses as an example, its adoption could be led by a Head of Bids who wants to improve bidding performance; Business Development owners who want better results; a procurement officer who wants to drive better buying outcomes; or even board-level decision makers such as Partners and CEOs who want to maximise returns on their bidding investment and improve business performance.

There are many benefits for those who adopt the standard, from opportunity-maximisation to risk mitigation. Fundamentally, we see better bidding outcomes for all as a result.

**Who is driving the standard's production?**

Many people will be involved in the production of the standard but there are three core parties responsible for making it happen:

1. BSI will lead the execution and delivery of the standard's development.
2. APMP will be the standard's Sponsor. As the global association for our profession, it will fund the standard's development directly with BSI and promote it as a stakeholder.
3. BidCraft will be the volunteer Technical Author, drawing on many years of collective bidding, procurement, and project management experience to write the consensus-based standard with direction from the previously mentioned stakeholder group.

**What's the catch? Why doesn't this exist already?**

We're not entirely sure ourselves! This will be an industry first and it's worth noting a standard in any guise is not the same as certification; this new standard will be complementary to APMP certification. We can only presume it doesn't yet exist because of the sheer resource required (in terms of time, energy, and capital) to produce standards of this kind.

One thing we do know is there's already been a fantastic response to it within industry and government, from senior leaders who've recognised the urgent need for a trusted standard to secure better bidding and procurement outcomes.

**How can APMP members and BQ readers get involved?**

The standard will be released for public consultation once in a developed state so everyone can view and provide written feedback before its final release for professional use. All feedback from every stakeholder, APMP members included, will be gratefully received and considered.

**Where and when will the standard be accessible?**

We anticipate the standard being ready for publication and use from summer 2023. It will be freely available for anyone to access and download directly from BSI's website at [www.bsigroup.com](http://www.bsigroup.com). APMP and BidCraft will also share updates and promote the standard once it's published.

**And finally...**

I remember the impact the APMP certification programme had when it was launched in 2004. This standard is another major milestone in the proud history of APMP and our profession. It will be transformative and take us all into a bold, confident, and exciting future.



# BIDS VERSUS PROCUREMENT: A GUNFIGHT WORTH WINNING?

“Oh great?!”, I can hear you think. “The procurement person’s article... this will be fun. Not.” (as you look around for a pile of rocks or knives to throw).

Well, I could do the same. By way of prep for this article, I asked a few Procurement colleagues to give me their experiences of the good, the bad and the ugly of proposals over the years. Out came a barrage of bads and uglis - but no goods.

- The lady whose nervous tic in a presentation was applying her bright red lipstick as she spoke – I remembered it and the colour vividly but had no recollection of what the pitch was about.
- The time the ill-prepared salesperson pitching the presentation ran out to the car park in full view of the client and downloaded a bog standard (but unfortunately also animated) presentation to pitch with. The client had the embarrassment of seeing their logo disappear in a hail of gunfire bullets as his disastrous talk progressed.
- The proposals with loads of grammar and punctuation issues to the point it was unreadable and thrown out. And also – particularly ugly to us Procurement folks – the obvious cut and paste ones, especially those forgetting to change the client’s name.

BETH WALLACE



## SEE? WE HAVE OUR PILE OF ROCKS READY TOO.

But what does that do, other than re-enforce the collective stereotypes we have? I therefore thought to focus this article on what makes the difference. Why would a pitch document make me choose you over your competition? The simple answer is: you know when you read a great proposal document that the potential supplier just “gets it”. The struggle is not finding the right points to score against the criteria but thinking why full marks would not be accredited. I appreciate this is not always obvious so let me explain further:

- The work to understand what we are trying to achieve and how the client ticks before any document goes out might be weeks or months in advance of any need for a proposal to be written. This should include Procurement. I always recommend you at least think about them when creating your client stakeholder map. Also, do not forget governance in some sectors might dictate more formally how you can liaise with your client; done correctly this could potentially help you influence the final scope of the pitch.
- The really ‘on point’ clarification questions or requests. These are not the “Can we exceed the word count?” type or the ones that ignore the remit entirely and try to fit the supplier solution square peg in the client round hole. These are the ones that make the client think about its scope and what it wants, particularly in a potentially complex transaction. Often the scope is created by a team including technical, operational and procurement resources in tight timescales dictated by business needs rather than Procurement. Whilst it should all naturally make sense, sensible challenging of the requirements is definitely welcomed.
- The cultural fit between the two organisations – the certainty the two companies could work together for a common goal rather than a separate sales (or even savings) target. Strangely, this also includes following the rules of the procurement process at play for the pitches. Yes, that does mean not including

marketing bumb or making sure every question is answered but also includes lines of communication between the parties. When a potential supplier does not follow simple instructions – no matter how frustrating they may seem – it introduces an element of nervousness (or indeed risk) into the relationship before it has even started. It always has a negative impact on the scoring.

- Would you believe I also have a great deal of respect for suppliers who say no to pitching at all? It might not be for you, it is not economical, the requirement does not make sense, it might not fit your strategic direction, you do not think you would have a great chance of winning and thus need to focus on more certain pitches. All of these are valid reasons. Good clients – including the client’s Procurement team – should be having those early conversations to gauge appetite. If that has not happened and the document has just been sent out, you will know better than me how it impacts your success rate. I would rather receive a smaller number of great proposals than a load of mediocre or even poor ones to review.

What else might make a difference? I know there are discussions in your profession about further best practice standards. From my perspective, improving best practice would not do any harm – but making it too standard might make it more difficult for the client to see clear blue water between the various proposals. This would be no different to a Procurement person downloading some of the templates and processes from our Chartered Institute of Purchasing and Supply website. These are helpful as a starting point but you will all have examples where the issued tender document is about buying widgets rather than services. How infuriating is that for you to read? The same would be true in the reverse.

For me, the differentiator is absolutely the quality of the written document. There is so much more but that at least gets you in the door. It is up to you to do the rest.

HOW THE  
CLIENT  
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# BEST PRACTICE DEFINED

(BECAUSE WE NEED TO BE REMINDED)



“ **THE SECRET SAUCE FOR ANY BEST PRACTICE IS IN THE RESEARCH** ”

Translating Old English to Middle English to Modern English was a passion of mine at university. I majored in English Literature and could not get enough of learning where a word or how a phrase evolved into what we use today. My daughter calls me a “word nerd” and my son says mine is the most “uninteresting major in the history of modern education.”

That is not true. The discipline of translation can be applied to everyday life. One can trace a word right down to its root and phrases and watch them slowly evolve over time. By slowly, we’re talking about evolution over centuries.

Through my 34 years in association management, I have seen one phrase that changes meaning as often as the tide at the beach. The phrase is “Best Practice.”

Those two simple words apparently can shapeshift into a variety of meanings at the whim of its user.

According to the *Merriam-Webster Dictionary*, best practice is defined as “**A procedure that has been shown by research and experience to produce optimal results and that is established or proposed as a standard suitable for widespread adoption.**”

There are four key words we should hold ourselves accountable to in that definition. They are “*procedure*” and “*research and experience*.” When talking about best practice, that’s all you really need to know. Procedure. Research and Experience. Full stop.

As an association executive serving the bid and proposal industry (and others before that), I have seen the phrase “Best Practice” misused in the most embarrassing ways. The most common form is in marketing copy. By attempting to sell a solution or a service, you will often see the phrase “Best Practice” pop up as reinforcement on why you should buy.

Too often, people toss the phrase “Best Practice” out to convince you it is standard operating procedure. Most of the time it is not. Some people routinely say that a process is best practice because their company prefers things done a certain way or, worst of all, it is their opinion.

If a best practice is missing the basic tenets (procedure, research and experience) it is not a best practice. Most of the time the phrase “Best Practice” is missing one key ingredient (screaming from the highest mountain): “RESEARCH”.

Without verifiable research to support the hypothesis of the process, it is simply an opinion. Without research, the claim is as weak as a watered-down cup of coffee. It has little to no meaning.

Associations like APMP know it must prove the process through research, usually through its own members, before calling it a best practice. For example, APMP’s Body of Knowledge was created and written through research. APMP’s family of certification was created and written through research. We research it, because we know that’s the only way standards and governing organisations like the British Standards Institute, American National Standards Institute, or certification governing bodies like the APM Group will accept it as a best practice or standard.

By research, we aren’t talking about a LinkedIn poll or a five-question survey. We are talking about a cross-section of users worldwide who have an opinion about a process and the way things are done, and exhaustive conversations and focus groups debating and getting to one true meaning. The research is usually conducted by a third party over a long period of time and is generally an expensive process.

One of the reasons associations exist is to publish verifiable, researched procedures for their members. Associations globally are proud of that but are seldom recognised for their rigor in determining best practice.

There is, however, an antidote to the misused phrase “Best Practice”. If you read, hear, or see it, simply ask the user about their research process. If the research does not exist, it’s an opinion. If the research is light or skimpy, it is still an opinion.

We ask those who misuse the phrase “Best Practice” to instead say “*In my/our opinion, this should be the process...*” That is far more accurate.

**The secret sauce for any best practice is in the research.**

“ **IF A BEST PRACTICE IS MISSING THE BASIC TENETS (PROCEDURE, RESEARCH AND EXPERIENCE) IT IS NOT A BEST PRACTICE. MOST OF THE TIME THE PHRASE “BEST PRACTICE” IS MISSING ONE KEY INGREDIENT (SCREAMING FROM THE HIGHEST MOUNTAIN): “RESEARCH”.** ”





# THE RISE AND DEMOCRATISATION OF LEADING PRACTICES

CERI MESCALL

The Merriam-Webster Dictionary defines best practice as “a procedure that has been shown by research and experience to produce optimal results and that is established or proposed as a standard suitable for widespread adoption.”

Based on my observations of the bid and proposal industry, the concept of best practice can feel rigid and static. I prefer to use the term leading practices, recognising that we need to scale how we do things according to different scenarios (i.e. what is best in one situation may not be best in another), and we need to

adapt over time (i.e. what is best now may not be best tomorrow).

When many of us began our careers in bids and proposals, we relied upon traditional resources and experience. This included the Association of Proposal Management Professionals (APMP) certification syllabi - I still have a well-used copy of the Shipley Guide Third Edition I originally used to prepare for the APMP Foundation exam. And there was advice from direct line managers, many of whom had “fallen into” bids and proposals.

“DUE TO THE EVOLUTION OF OUR PROFESSION, THE IMPACT OF TECHNOLOGY, AND THE ABUNDANCE MINDSET OF MOST PROPOSAL PEOPLE, WE’RE SEEING THE RISE AND DEMOCRATISATION OF LEADING PRACTICES. THIS ARTICLE EXPLORES HOW YOU CAN ACCESS LEADING PRACTICES THROUGH CONTENT, COMMUNITY, AND COACHING AND MENTORING.”



## CONTENT

You can consume a variety of curated content, including the APMP Body of Knowledge (BOK), books and articles.

● **The APMP BOK:** The BOK comprises 51 topics organised into seven categories. There’s also a full-text search capability, a glossary, a list of acronyms, and a repository of tools and templates. APMP updates the BOK based on members’ feedback – it would be fascinating to see a log of the updates made and the reasons for them.

● **Books:** Titles on your bookshelf may include newer Shipley Guide editions, SMAwins Program Lifecycle Body of Knowledge book series, Neil Cobb and Charlie Divine’s *Writing Business Bids and Proposals for Dummies*, Tom Sant’s *Persuasive Business Proposals*, and Jon Williams and BJ Lownie’s *Proposal Essentials*.

● **Articles:** Your browser bookmarks may include Bid Solutions’ Bidding Quarterly, Strategic Proposals’ white papers, APMP’s Winning the Business and the PropLIBRARY. However, many of your “a-ha” moments may have been in relation to LinkedIn posts – Rachelle Ray, Juliet Fletcher and Kathryn Bennett are three individuals who are top of mind for me.

In addition, you’ll see updates from BidCraft, the APMP and the British Standards Institution (BSI) on their development of an international framework for the bid and proposal industry. I’m already impressed by their consultative and transparent approach to this important project.

## COMMUNITY

You can seize opportunities to engage with fellow proposal professionals through social media platforms and groups, conferences, and online workshops.

● **Social media platforms and groups:** Three notable examples are Proposal Industry Experts (PIE), Women in Bids and Proposals (WIBAP), and the APMP’s Affinity Groups (LGBTQ+, Military and Veterans, Professionals of Colour, and Young Professionals).

● **Conferences:** Recent conferences have included APMP’s Bid and Proposal Con and Women’s Virtual Summit. Upcoming events include Loopio’s Loopicon 2022. We’re seeing the crowdsourcing of topics and speakers.

● **Online workshops:** There’s been a shift from traditional webinars (where the flow of knowledge was one-way) to more interactive, collaborative offerings including PIE’s Office Hours, Baachu Scribble’s Insider Training, and Pipster Solutions’ Bid Bites and Thursday Throng.

## COACHING AND MENTORING

You can receive coaching and mentoring through formal schemes, informal learning, and tools:

● **Formal schemes:** Formal schemes include the UK Bid and Proposal Co-Ordinator apprenticeship which launched in 2019. Katie Dongworth (Pipster Solutions) recently passed her apprenticeship with Distinction. There’s also APMP UK Rapport - a highly professional programme that focuses on the individual’s career situation and aspirations within the bid and proposal profession. The aim of Rapport is to help individuals to be the best they can be in their current role and to provide a platform to help them achieve their aspirations.

● **Informal learning:** Examples include teaming senior and junior proposal professionals on an opportunity. The senior resources can learn as much from the junior resources as the junior resources do from the senior resources. There are also opportunities to learn from new hires who have joined from a competitor, and from colleagues in bid/proposal-adjacent roles (e.g. account management, pricing, marketing). There are fresh insights when working with other organisations (as part of a consortium bid) or with independent proposal consultants. There are pre-mortem sessions (per Eve Upton’s thought leadership), internal lessons learned sessions and external client debriefs.

● **Tools:** Proposal-specific examples include the My Proposal Coach and the Proposal Benchmarker (and accompanying webinars/white papers) from Strategic Proposals. However, there are a variety of writing-related tools (e.g. VisibleThread, Hemingway and Microsoft Word’s Editor) and presentation-related tools (e.g. Microsoft’s PowerPoint Presenter Coach) that provide real-time guidance too.

## WHAT NEXT?

Bid and proposal leading practices will continue to evolve. Each one of us has a part to play - I even asked three former colleagues and good friends for ideas for this conclusion. After reading this article, I encourage you to:

● **Consider the “why”:** Mehnaz Thawer suggests that using leading practices should generate benefits such as improved win rate, elevated quality scores or increased job satisfaction. Micheline LeBlanc argues that many leading practices have been developed in lessons learned sessions after challenging proposal submissions.

● **Adapt as needed:** As Shradha Talwar states, you can scale leading practices according to individual/group communication styles, organisation (bidder and client) industry and geography, and proposal timelines.

● **Share your knowledge and recommend other resources:** The content, community, and coaching and mentoring examples I have referenced barely scratch the surface – comment on the article with your tips and referrals.



# TRUE BIDDING PROFESSIONALS ARE STACKERS, NOT ROLLERS

## CRAFTING THE ULTIMATE SUBMISSION

In my bidding career I've seen a growing pattern emerge. We bidding perfectionists always start a new bid with the objective of crafting 'the ultimate submission'. At the outset there's a palpable sense of excitement as bidding teams make plans and gear up for the task ahead. We are naturally optimistic.

But often, somewhere along the way, best laid plans go awry. In such cases there's a subtle shift from an aspirational objective of 'getting it done brilliantly' to a more pragmatic one of simply 'getting it done'. Sometimes, when things get ugly, bid efforts are painful. It is not surprising those bids often don't win. Yet we keep fronting up time and time again. Does that also make us masochistic?

A colleague recently described this process in a far more articulate manner, suggesting that all bidding projects start out in a climate of perpetual sunshine. But then the rain comes, and we seek shelter while we plan a different path to our goal. I thought it a beautiful observation of the reality of our role.

## ARE WE FOCUSED ON THE RIGHT STUFF?

This mid-bid recalibration seems such common practice that I wonder whether our current perspectives on best practice are correctly focused. Don't get me wrong, I wholeheartedly endorse concepts like client centricity, the importance of structure, answering the question, ensuring compliance and providing evidence.

But the bulk of these techniques are focused on the things we bidding professionals have most control over – process. The conundrum is that our application of these best practice processes is perfect world stuff and is therefore, arguably, only half of the bidding equation.

As bidding professionals, we know what else matters: how to prioritise a slim bid budget, how to secure timely SME inputs and how to convince key stakeholders their engagement level matters. These are the most common challenges I hear being voiced around our BidWrite consulting offices. Interestingly, they are all behavioural elements. As such, they are not all black and white.



## OVERCOMING THE BEHAVIOURAL CHALLENGES

All bidding activity occurs within a professional and social context where behavioural elements abound. Levers are being pulled, corners are being fought and personalities are at play. Such is the life of the bidding professional. It is our ability to successfully navigate these challenges, and still meet the submission deadline, that makes us such a valuable contribution to work-winning endeavours.

Perhaps it's time we place more emphasis on the behavioural elements of bidding than we currently do. This would mirror developments in previously theoretically-driven disciplines like Economics and Finance, which have adopted a more behaviour-centric view of their respective knowledge bases. They understand there's a place for things that work on the whiteboard, but it's how that plays out on the irrational ground of human nature that really makes an impact.

## WHO'S THE JUDGE ANYWAY?

This line of thinking could then lead us to a provocative question about bidding best practices. In the end, does it really matter whether it's the APMP Body of Knowledge, the Shipley Method, the BidWrite Way, or Any Other Way? It seems to me they are all different methods designed to achieve the same outcome. And there's nothing wrong with that.

But ultimately, the thing that really matters is what buyers think about the outputs of these practices. These buyers are the ultimate arbiter of our efforts, and you can be sure they won't be judging us on our methods – good, bad or ugly. They'll be judging us based on quantitative and qualitative perceptions about how well (all things considered) our submission 'product' meets their requirements. In effect, the buyers become our judge, jury and potential executioner.

## STRIVING FOR THE MAXIMUM POSSIBLE PRODUCT

But let's go back to where we started and reconsider 'the ultimate submission'. Ideally, we want the most well-resourced team we can muster to implement our best practice processes flawlessly in perpetual sunshine. Some might call this Fairyland! But what if we somehow manage to pull this off and the bid still doesn't win?

Perhaps a better definition of perfect is a bid that wins, with the least amount of effort and the greatest profit margin. In reality, we know this approach is also unlikely to succeed most of the time.

So let's look at it another way, by borrowing the concept of Minimum Viable Product (MVP) popular in the software industry. For our bidding profession I've called it Maximum Possible Product (MPP). This represents a pragmatic mindset to deliver the best possible product we can, with what we have available, despite the constraints and behavioural challenges that exist.

## STACKING THE DICE IN OUR FAVOUR

I must admit I felt a little uneasy about the phrase 'rolling the dice' as it applies to this issue of BQ. In my experience, good bidding professionals don't leave that much to chance. With an MPP mindset, we are experts at squeezing the most amount of juice out of what we are given to work with. Then when the bidding rains come, what I see are considered decisions about what we can do with what we have. Rather than just roll the dice and hope, our job is to stack the dice in our favour.

It's a very delicate process that requires constant revisiting during the lifecycle of a bid. It doesn't always work out but that's the nature of competition. And it's the endless pursuit of learning how to stack the dice better that keeps us coming back for more.

By approaching our bids in this manner, we then move from Masochistic Rollers to Optimistic Stackers in pursuit of the ultimate submission. This skill appears effortless for talented bidding professionals, and it's magical to watch when done well.

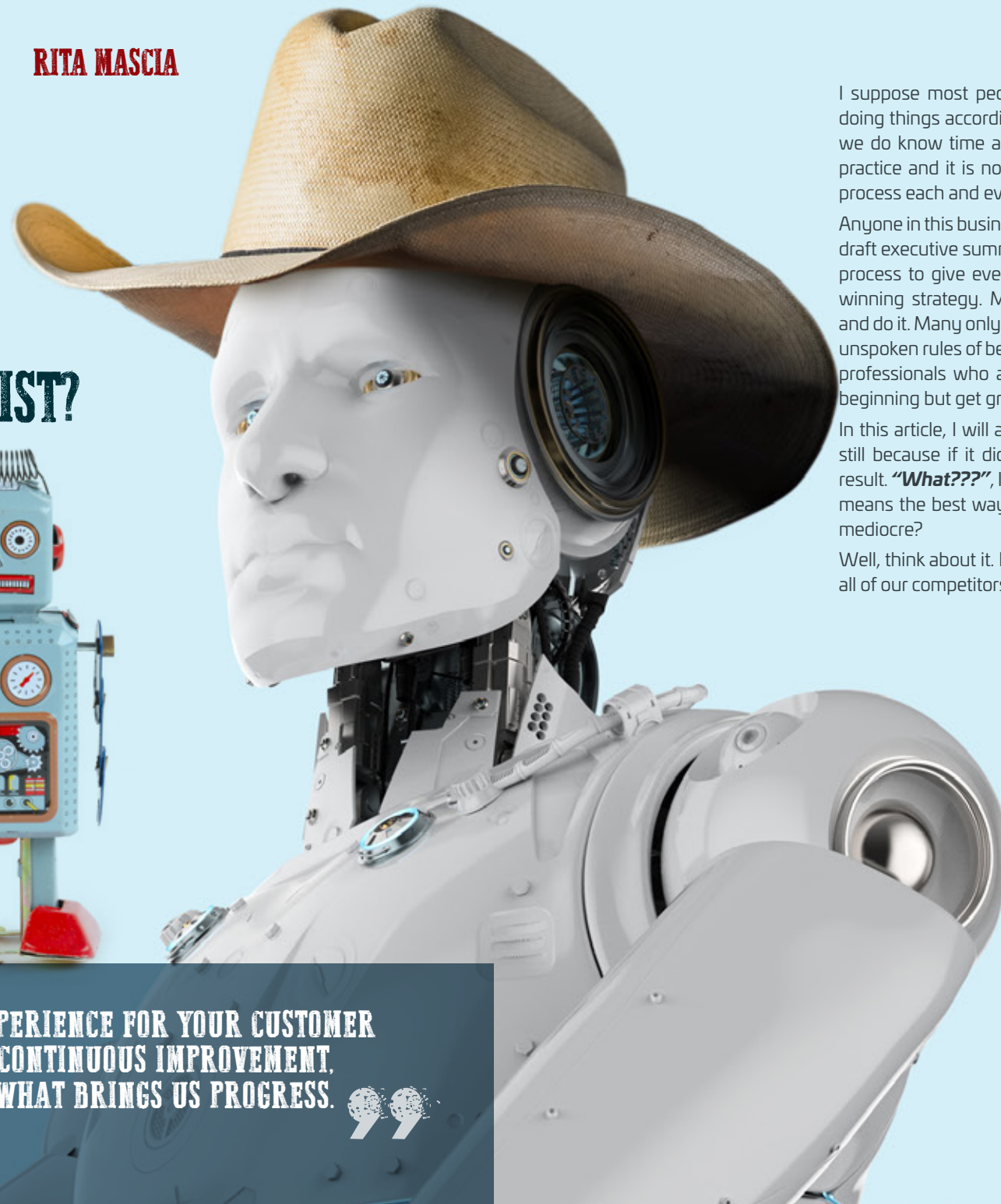
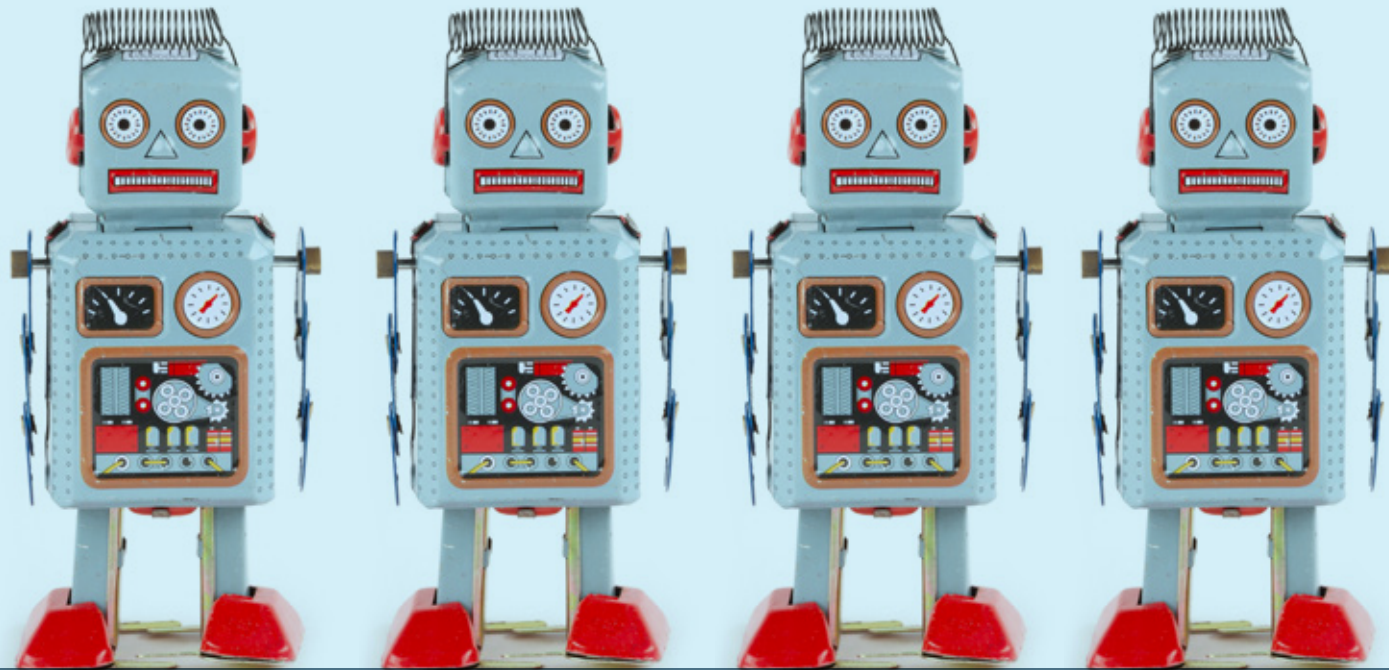
“GOOD BIDDING PROFESSIONALS DON'T LEAVE THAT MUCH TO CHANCE... RATHER THAN JUST ROLL THE DICE AND HOPE, OUR JOB IS TO STACK THE DICE IN OUR FAVOUR.”



# BEST PRACTICE OR DARE TO BE DIFFERENT!

RITA MASCIA

## WHAT IS BEST PRACTICE, AND DOES IT EVEN EXIST?



I suppose most people would say best practice means doing things according to agreed quality standards. But... we do know time and deadlines get in the way of best practice and it is not always possible to follow a quality process each and every time we submit a proposal.

Anyone in this business long enough will tell you to have a draft executive summary at the beginning of the proposal process to give everyone a steer in the direction of the winning strategy. Many people are religious about this and do it. Many only do it at the end. Are they breaking the unspoken rules of best practice? I know excellent proposal professionals who admit they don't always do it at the beginning but get great results anyway.

In this article, I will argue that best practice cannot stand still because if it did, mediocrity would be the eventual result. "What???", I hear you saying. Surely best practice means the best way of doing things, so how can I call it mediocre?

Well, think about it. If everyone - and I mean all of us and all of our competitors - were following best practice to the letter in any given profession, the results would be a sea of vanilla or penguin proposals<sup>1</sup>. We would all be submitting monochrome proposals indistinguishable from any other. They would all look and feel the same. No one would stand out against the competition.

So I'd like to propose an alternative way to look at best practice. What if we called it 'next practice'?

Surely best practice would be something that makes your proposal distinct from your competitors or from the norm. Something that makes you think, "This feels unique". My point is people often confuse best practice

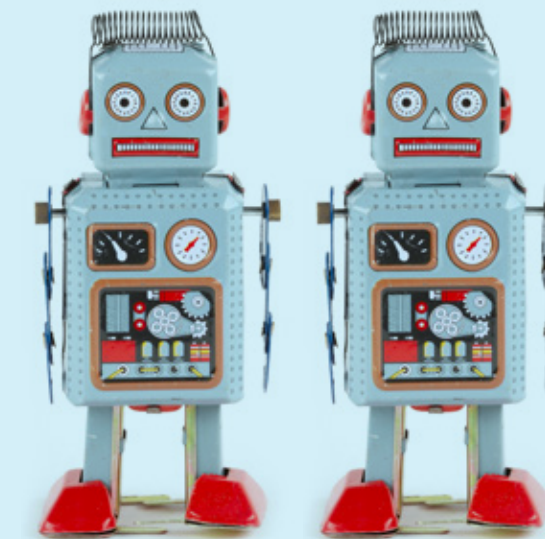
with a standard, "something used as a measure, norm, or model in comparative evaluations"<sup>2</sup>. Standards are the minimum necessary to consider something sufficiently acceptable and fit for purpose. Best practice, therefore, tends to be something that meets a 'minimum' acceptable standard and is the benchmark for a particular industry.

My argument is best practice is not what the majority in an industry does. Best practice includes all the approaches and innovations delivered on top of the minimum standards for a particular industry.

Let me give you a practical example from the world of bids and proposals.

As proposal professionals, we all know the importance of winning with each and every submission we send to a customer. In our industry, it may be called best practice to have a set of win themes and win strategies repeated throughout the document to persuade the client to choose us. You may say these themes and strategies are necessary for success.

Then someone clever like Eve Upton<sup>3</sup> (thank you Eve!) produces an alternative way of being a winner by turning win strategies upside-down and focusing instead on 'how not to lose'. She calls this technique 'Pre-mortem'.



Rather than sitting at the end of a bid process listing all the things that went wrong in a bid submission (a well-known best practice called Lessons Learned Review), a proposal team would do this at the planning stage and anticipate anything that may go wrong at the start of the bidding process. This approach is a way of planning for the worst so that we cannot lose.

If you ask me, this is an example of 'next practice'. Something that turns the status quo (best practice) on its head and innovates a methodology to do it better.

To go back to Martin's original question: "What does best practice actually mean to you?"

For me, best practice is a process of continuous innovation. I don't think it is a tried and tested process, an external benchmark, or a set of standards everyone in the business adheres to. Best practice for me is when you deliver the best possible experience for your customer and your team while breaking new ground at the same time. Continuous improvement, trying new processes and methods, and being adventurous is what brings us progress.

Certainly in bid management, as in other fields, best practice is not a way to keep the status quo. Spreading best practice is to be brave, try new approaches or completely subvert the way things are done.

So next time you are working on a bid, be more like Eve. Be daring and be the one who leads the rest of the industry - not with best practice but with 'next practice'.

<sup>1</sup> Credit to Jon Williams of Strategic Proposals for the term 'penguin proposal'. I first heard it in one of his training sessions to describe proposals that all look the same.

<sup>2</sup> Oxford Languages

<sup>3</sup> <https://academy.bidcraft.co.uk/courses/pre-mortems>

“BEST PRACTICE FOR ME IS WHEN YOU DELIVER THE BEST POSSIBLE EXPERIENCE FOR YOUR CUSTOMER AND YOUR TEAM WHILE BREAKING NEW GROUND AT THE SAME TIME. CONTINUOUS IMPROVEMENT, TRYING NEW PROCESSES AND METHODS, AND BEING ADVENTUROUS IS WHAT BRINGS US PROGRESS.”



# SCULPTING THE WRITTEN WORD

We live and work in a communication world. In bids, we must ensure our readers stay focused on the benefits to them (and/or their stakeholders) of what they're reading, not on figuring out its meaning. The writing must be easy to understand. That way, it will be more likely to make an impact.

I use my impact equation as a guide to writing:

## CLARITY + BREVITY + VALUE = IMPACT

The three left-side variables are mutually inclusive; weakness in any one reduces impact.

In our quest to influence procurement decisions in our favour, we first make the block of stone look about right by carving it into the basic form we need, after which we chisel it into its final state. We create the story we want our readers to absorb – what the reader needs to know – not every tiny detail about the subject.

It's best practice to do that succinctly (...+ Brevity +...). This is even more so in our world of short attention spans, time

pressures, and word (or worse, character) restrictions in bids. Give your reader an easy time when your response is on their screen at 4pm on a Friday\*

## A DEFINITION OF BEST PRACTICE

Here's a definition of best practice I found:

**'...a method or technique that has been generally accepted as superior to other known alternatives because it often produces results that are superior to those achieved by other means or because it has become a standard way of doing things...'**

## LET'S CHISEL:

**'...a method generally accepted as superior because it produces results better than from other methods or it has become a standard way of doing things...'**

That's saved 15 words (38%). I'll bet we can make the statement even leaner if we keep working on it.

What changed and what remains?

- '...method or technique...' We don't need both. 'Method' seems sufficient.
- We don't need '...that has been...' because we're merely stating what best practice is.
- 'generally' remains, to make the point about widespread acceptance. We'll come back to that word in item 5.
- '...to other known alternatives...' is tautological. If something's considered superior, it must be in comparison to alternatives. There's no need to state that unless the other things are relevant in the moment.
- '...it often produces...' That means it doesn't always produce superior results, but it does so more frequently than not. The word 'often' introduces doubt. We don't need doubt.
- I replaced the second 'superior' to avoid repetition.

\* Or whichever day the weekend starts where your client's based.

There are so many ways writing can be made leaner. Here are seven quick wins:

## 1. SHOW, DON'T TELL

In BQ10, I advised showing instead of telling. Showing enables us to write more efficiently.

**'Traffic Manager Jenny Jones brings her extensive experience of traffic management liaison.'**

Such empty sentences create reader drag. It's much better to make sentences work hard by showing relevance. We might envisage something like:

**'Traffic Manager Jenny Jones' 25-year experience of leading traffic management on the strategic road network includes exceeding stakeholders' requirements, e.g. KPIs set by the village's Roads Community Group and by Network Rail.'** (...goes on to provide detail.)

The second version is worth the investment in extra words. It reveals much more without needing an empty setup, so it's more efficient.

## 2 VARY SENTENCE LENGTH TO EMPHASISE POINTS AND TO CONNECT THEM

Use short sentences to emphasise points and longer ones to connect ideas. In both cases, get to the point.

**'Our logistics strategy reduces traffic movements by 35%. [SHORT: 8 words] The logistics system, managed by [role], co-ordinates site delivery volumes in keeping with local stakeholders' requirements to avoid bottlenecks. [LONG, but still only 19 words] (...goes on to provide detail.)'**

Varied sentence lengths contribute to the ebb and flow of writing to avoid monotony.

## 3. DELETE UNNECESSARY WORDS

Examples (if they suit the context):

**'...the interactions between systems...'**

**'...ensure that the systems to be delivered are specified...'**

**'...lifecycle of the project...' → '...project lifecycle...'**

## 4. AVOID WORDY WAYS OF WRITING SHORT THINGS

Example:

**'prior to'** means **'before'**. Neither indicates precise timing, so you won't lose meaning by using the one-word version.

**'...prior to the commencement of...'** → **'...before starting...'**

## 5. REMOVE NON-VALUE-ADDING DESCRIPTORS

Some words seem appropriate in speech but add no value in writing.

Examples:

**generally, completely, just, basically, really, very, extremely, totally, essentially, practically, literally, actually, and effectively.**

**'...is very important...'** What's the difference between important and very important? If we explain the reasons for the importance, the reader will understand we're making a point about significant consequences in the event of not taking the stated action.

**'...is essentially a way to...'** So is it a way or not?

Be careful with **'effectively'**:

**'[Role] will effectively manage [task] by...'**

That tells me [Role] will sort of manage [task], but not really. Put the adverb after the verb if you want to use it:

**'[Role] will manage [task] effectively by...'**

Now I understand [Role] will do a good job. Even better, just explain what [Role] will do, how they'll do it, why, for whom, by when, and what good will come of it for the reader and their business – thereby completely losing 'effectively'.

## 6. USE ACTIVE WRITING

Bid responses aren't usually technical reports, so language like **'...[task] will be undertaken...'** isn't appropriate. Passive language isn't even a great idea in technical reports.

Keep the writing active:

**'...[role] will [verb] [task] to achieve [benefit] for [beneficiary]...'**

or something along those lines because this format is more efficient.

## 7. USE SHORT WORDS WHEN POSSIBLE

**'...occurs within Phase 1...'** → **'occurs in Phase 1...'** Let's assume we've explained what occurs and who does it.

**'...utilise...'** → **'...use...'** Imagine you're reading out loud. Saying one syllable is easier than saying three. Equally, reading shorter words is easier than reading longer ones.

## THE SURFACE BARELY SCRATCHED

While this article barely scratches the surface of editing, the over-riding messages are:

Prioritise ease of reading and understanding.

Check if there's a way to write the same messages using fewer words.



# CLARITY + BREVITY + VALUE = IMPACT



# CHANGING THE STATUS QUO



**THE WAY WE LOOK AT PROPOSAL MANAGEMENT LIMITS OUR SUCCESS. TO GET OUT OF THE BOX SO MANY PROPOSAL PROFESSIONALS FIND THEMSELVES TRAPPED IN REQUIRES CHANGING THE STATUS QUO.**

Proposal management addresses the techniques required to win a proposal. In practice, it becomes getting by with what you've got to work with, and hoping to make incremental improvements in between proposals.

Progressing beyond incremental improvements requires us to change how we look at proposal development. There's more to it than 'The Process'. We need to take it to a more advanced level.



## WHAT COULD ADVANCED PROPOSAL MANAGEMENT ENCOMPASS?

Here are five key approaches we need to change:

**1. We need to stop looking at proposals as an expense and start looking at them as an investment.** Instead of minimising proposal costs, we should try to maximise the return on investment (ROI). Changing a 20% win rate to a 30% win rate increases revenue 50%. Instead of putting less effort into proposals, shouldn't we be putting more effort into the things that improve win rates?

**2. We need to change how we measure proposal efficiency.** Instead of defining proposal efficiency as the cost per proposal or the number of submissions per staff member, we should start thinking of proposal efficiency as:

$(\text{Value of submissions} * \text{win rate}) \div \text{the amount expended to win the proposals}$

This shows the ROI – the amount won for the amount expended. Suddenly the most important number becomes your win rate and not your cost. You can even see how increasing cost is worth it if it increases your win rate. ROI is the "efficiency" that matters.

**3. We need to educate our stakeholders about growth and the role proposal win rates have in achieving it.** Proposals are not a necessary evil which people should be forced to do in addition to their 'day job.' Proposals are an opportunity to bring growth to both the company and the individuals in it. Winning proposals is how the company creates jobs, opportunities for promotion, and invests for the future. Everyone is a proposal stakeholder and contributing to proposals should be a mark of pride. When proposals are the primary way a company grows, the very mission of the company becomes winning proposals. This is the core of a successful proposal culture. All forms of success – corporate and personal, technical and non-technical – result from it.

**4. We need an organisational model instead of a process model for proposal development.** Successful proposal preparation is not primarily driven by steps. Proposals are primarily driven by expectations, decisions, and interactions that should all be based on ROI. Proposal friction results when everyone doesn't share the same goals and can't resolve their priorities based on the same criteria. Friction lowers win rates, which negatively impacts ROI and lowers growth.

**5. We really need to define proposal quality and provide the means to measure it.** How many companies have a written definition of proposal quality and perform their reviews according to written quality criteria? We need to change all the nonsense related to the colour team proposal model – it results in reviews without a clear scope which rely on a subjective determination of quality. Would a quality methodology like that be accepted anywhere else in business? We're falling behind.

Much of this change is beyond the authority of the humble proposal manager. Advanced proposal management requires a fully integrated approach that involves the entire organisation. At the very least, a company may need to form an integrated process team and appoint an executive to focus on ROI instead of production.

An organisational approach to growth depends on making the proposal part of 'our job' and not 'their problem'. An assembly line approach will not produce competitive proposals or maximise your win rate and ROI. Let your competitors build proposal assembly lines. They will be easy to beat since they end up competing on little more than price and will make up for losing by bidding in volume.

## HOW I BROKE OUT OF THE STATUS QUO

I was giving a presentation at an APMP event years ago on how to improve your red team reviews. In the middle of speaking, I realised the problems can't be fixed because they are inherent in the colour team model. Thinking about what might replace it, I started by defining proposal quality and created proposal quality criteria with a flexible approach for reviews. This turned the reviews into validation of specific quality drivers instead of fishing for problems. There's a bit more to the methodology but this approach shows the status quo can be escaped by focussing on what we are trying to achieve instead of following the legacy steps we were taught.

## CHANGING HOW REVIEWS ARE DONE AFFECTS EVERYTHING

I realised that planning proposal content to fulfil the quality criteria before writing would improve criteria-based quality validation. I then added a way to assess information gathering before the proposal starts to ensure information for preparing the content plan and fulfilling the quality criteria was available. I kept breaking down and rebuilding the 'accepted' process until I had created the MustWin Proposal Process – a fully integrated process that makes proposal development more efficient, sets expectations, enables progress and quality to be measured, and increases your chances of winning. It focuses on getting the right information and going through the steps to turn it into a winning proposal. You can read more here: <https://proplibrary.com/proplibrary/item/32-what-is-the-mustwin-process-and-how-is-it-innovative/>

This is what has me thinking about advanced proposal management. My hope is that you'll join me to help define it. It's necessary. Every other part of the companies we serve has adopted far more advanced quality methodologies. The status quo is no longer competitive.



# HERE IS THE DILEMMA

## THE PERILS OF REUSING HIGH SCORING BID CONTENT

**YOU HAVE TO GET A BID IN AGAINST A LOOMING DEADLINE. FOUR HIGH-SCORING QUESTIONS ARE COVERING SOCIAL VALUE. THIS IS AN AREA IN WHICH YOUR COMPANY EXCELS. YOUR BOSS GIVES YOU SOME RESPONSES TO A PREVIOUS BID WHICH THE EVALUATORS SCORED VERY HIGHLY. "EASY-PEASY," SHE SAYS. "JUST USE THESE AND PUT TOGETHER THE RESPONSES."**

Andy Hoigh

This is a real situation which I ran into on a client's recent bid. The bid was strategically important. Timescales and resources were tight. I was the solution to the client's problem!

I had a look at the "Good" responses. They were all well written and had a good balance of solution and assurance.

The "How" question responses were laid out with clear descriptions of the steps in the proposed process and the associated timelines. The individuals responsible, the metrics, reporting processes and an outline of how things would be put right if they went wrong were all included. There were several references in each part of the response labelling where the business had done this before. Testimonials supported the successes they claimed. A one-page, "feel good" case study completed the response. No wonder the evaluators liked them!

However, reality then kicked in. Each of these "Good" responses was 12 pages long. The page limit in my bid was four pages per question. When I broke down the question elements in each of my bid's requirements, I discovered that I had 28 to 30 specific points in each question I must address! That is about seven elements per page. One short paragraph per point. In each requirement, several of these points were of the form "How will you ...". My list of "How" elements now looked uncomfortably long.

The next problem was that the specific questions asked in the previous bid's Invitation to Tender document were not the same as in my bid. They were similar in that they covered the same main topic areas. However, many of the question elements were new or different. What "in Heck's name" should I do now? A lie down in a darkened room beckoned.

So, here comes the roll of the dice. I think I had three options in this situation and if I had ample time, I would choose the Good solution:

1. Lay out each of the individual and specific points which needed a response in table form, in the order of the client's question.
2. Using the client's question structure as main headings, create a sensible heading structure for the response from the tabled points. This needs to be worked to fit the allowable pages when the heading structure is fully populated. Better still, allocate space or word counts to each heading. This will make it even easier when you are writing.
3. Carefully go through the "Good" responses and extract the text that best fits against each point in the table. Add this to the table against the particular point. An exact fit against the question is not needed, only that the specific point in the new question is reasonably well covered.
4. Start writing against the specific topic in the heading using the "Good" response text as guidance (or lift it directly if it fits). Rigorously exclude any word, phrase or sentence which does not directly address the specific description in the heading. Then, revise the text until the word count or space limit is achieved.
5. Either write the response text missing from the "Good" response yourself or (better still) find an appropriate expert to write it. Again, rigorously exclude any word, phrase or sentence which does not directly answer the specific description in the heading. Keep revising the text until the word count or space limit is achieved.
6. When the response is complete, leave it for 24 hours and then read it through again. If it is still too long, consider deleting some specific responses (and risk ignoring a client's question element). Choose bits of the response which will have the least impact upon the overall solution you are proposing. Keep revising the text until the word count or space limit is achieved.

Of course, this all takes time. If time is tight, you may just want to carefully read the "Good" response, create a heading structure from your client's question and then begin writing. Should your recent review of a good response permeate your thinking and your new text? I would label this as a Bad solution. Of course, the underlying story and flow which made the "Good" responses so good will be difficult to reproduce. It also relies upon your own expertise in the subject and your knowledge of the achievements made by the client's business.

The Ugly solution is to take the previous work and just cut it down to fit the page limit. On the basis that the original text scores well and that it covers the main area of the question, it should work. Plus, this has the advantage that your boss will see you have done what you were told. You have used the "Good" text. Another plus is that when the scores come back as very poor, you can avoid much of the personal responsibility. After all, the boss told you what to do and another evaluator scored it very highly!

Which did I use for my bid? I wimped out! I told the client that (truthfully) I was not an expert in Social Value or its business. As winning the bid was strategically important, I suggested (strongly) that they should use a real expert to create the responses, which I would review. The client saw the sense in this. I am now waiting to do a forensic review of the draft responses. I will criticise every bit of my "How" list which is missed. Sometimes honesty is the best policy.





# 'WE HAVE A PROCESS IN PLACE!'

CHRIS KAELIN

BEST PRACTICE

PROCESS

## THE FUNDAMENTAL MISCONCEPTION ABOUT THE RELATIONSHIP BETWEEN BEST PRACTICE AND PROCESSES

Having a solid process is the basis for any high-performance bid team. However, implementing best practice means far more than drawing a process chart with a sequence of approvals and sign-off points.

Does Roger Federer play 'best practice' tennis? Most of us will probably agree he does. He was ranked by the ATP as the world's number one player for 310 weeks (including a record 237 consecutive weeks). He has won 103 ATP singles titles, 20 Grand Slams (including a record eight Wimbledon men's singles titles), and a record six ATP year-end championships. He has been one of the very, very best. If you asked him the reason why, he might say, "It's the process." But he won't. Tennis is more about trained skills than know-how.

Just as process is not the key success factor for Roger Federer, your bid process is not the key success factor for your proposal win rate. Sure, every organisation needs processes to manage the interaction between departments, employees, and external suppliers. But there is a widespread, fundamental misconception about best practice: that bringing it into their organisation means re-designing their processes.

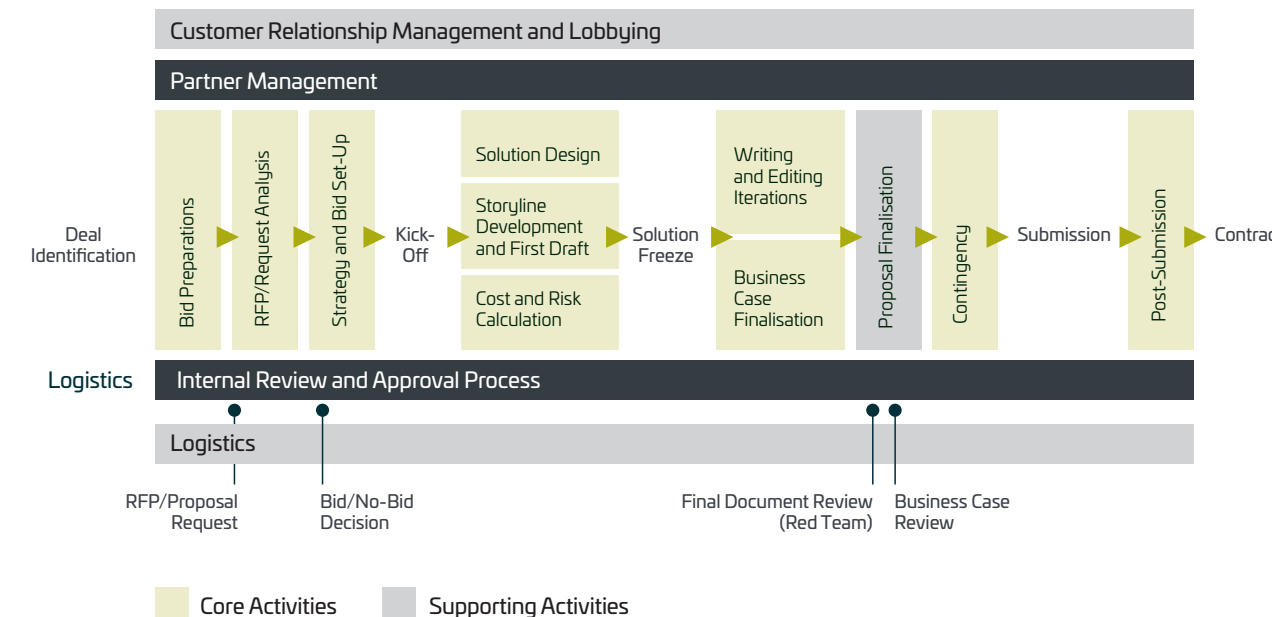
This is fundamentally wrong. Processes describe the sequence of certain tasks, independent from the quality of how these tasks are performed. Of course, tweaking the process is the easiest part of change management. You go to your drawing board, move a couple of boxes and arrows, and then tell your staff to follow the new process. Done!

However, compelling and winning proposals are primarily the result of the well-orchestrated cooperation of a team of trained and skilled professionals. In a complex B2B environment, every bid project is different: submission deadlines, bid team structure, business case structure, client requirements. Everything is different, every single time. As a result, the bid process must be flexible and adaptable enough to accommodate these changing factors. This can only be done through the definition of roles (not functions!) that are re-assigned for every bid.

The role description must contain the tasks and responsibilities within each process step. The roles stay the same, but the allocation of these roles to team members might be different each time. The underlying process (the sequence of activities) should serve as the navigation aid for all team members involved. The combination of a good bid process with the associated role descriptions exactly defines what needs to be done by which role in each step of the process. This is where many organisations fail.

In many organisations, the bid process consists of a few key tasks like 'RPF analysis' and 'bid preparation', garnished with a series of approvals (solution approval, business case approval, document approval, etc). Nothing wrong, but not very helpful. They often have only high-level role descriptions (if at all) which are not linked to the process steps. For instance, it must be crystal clear who should provide the target price in which phase. It should be clearly defined which role is responsible for proofreading, editing and formatting the proposal text. Bidding is an extremely cross-functional and cross-departmental exercise which needs more attention to detail than other processes in the organisation. The bidding process must be tightly linked to clearly defined roles assigned for every tender project.

A good bid process is more than a sequence of approvals and sign-off points as shown in CSK's BidMaster Framework below.



In most organisations in the complex B2B space, there is a different bid team for every opportunity. As a result, it is more important to document, communicate, and train these roles than in other parts of the organisation. Even when organisations have a well-documented and well-engineered bid process, it fails to apply when team members are insufficiently informed about their roles and responsibilities.

And finally, it is equally important to grow a trained bid team with the skills to develop a compelling proposal. Like tennis, proposal writing is more about skills than know-how! This includes sales professionals who are actually able to fulfil the client's underlying needs (not just the requirements stated in the RFP) and experienced bid managers who provide team leadership throughout the bid cycle (with its usual time pressure and occasional chaos). This enables the bid team to develop compelling win themes that go beyond the usual 'We are the leading provider of...' twaddle.

Good processes are important and helpful but they are not the only driver for success.



# AUTOMATIC WINNING

NIKE PARKINSON

Winning a bid is not guaranteed no matter how many best practices we follow but the odds of winning increase when we do.

A stellar proposal can lose and a mediocre proposal can win. Why? Because humans are not machines. A successful bid is based on more than our solution.

Evaluators, reviewers, and decision makers are biased and take shortcuts - just like you and me. Our decisions go through an emotional filter that is sometimes referred to as the "automatic brain." This part of our brain processes information faster than our "manual" (conscious, intellectual, analytical) thoughts. Decades of research validate that our automatic brain is efficient (burns fewer calories), is active at all times, and is almost always correct. This is why we have come to rely on it so much. Our automatic brain is continuously learning. That learning turns into memories, which leads to expectations based on these memories.

Expectations form biases and preconceptions. We see it in sales and marketing all the time. For example, if a decision maker has had bad experiences with our company, then they may expect a disappointing performance again. In this case, a proposal that should win because it meets and/or exceeds the criteria will most likely lose.

Biases and preconceptions help form our industry's best practices. These are factors that we can apply to help evaluators conclude - with their automatic (and manual)

brain - that we are trustworthy, capable, and better than our competitors. Case in point: evaluators may learn that the quality of the proposal is indicative of the quality of the solution. Is this true? Based on their experience, yes. Conversely, if polished proposals were associated with poor performance, then they would be biased against elegant bids.

Another example might be our customer has learned, through trial and error, that measuring process execution results in better outcomes. When they tracked asset performance, they were able to rapidly progress compared with an ad hoc, unmeasured approach. For this reason, specific numbers in bids - things that are quantitatively verified - builds more trust than explaining performance without proof or using generalities.

Many of the shortcuts your brain takes to determine if something is better are going to be similar for evaluators. For example, a poorly written document riddled with grammatical errors and misspellings negatively impacts how you perceive the professionalism of a related product, service, and solution provider. The same is true for the vast majority of reviewers.

At its core, decision makers want to know two things:

1. What is your solution?
2. Why should I pick you?

We want our best practices to efficiently help answer those two questions. To do so requires using more than one gold standard. Our proposals benefit when we use a symphony of smart standards to say why we are the right choice for this project. Best practices are demonstrative evidence of our professionalism, quality, efficiency, efficacy, and more.

Rather than take my word for it, let's look at two bid pages in the graphic. One ignores best practices. The other blends different techniques to help reviewers make the right selection. Which page looks more professional and shows a greater investment in this effort - left or right? This process is exactly what your prospects are automatically doing for each bid you submit. They can't turn it off.

Prove you are the top choice. Use several best practices to quickly and clearly explain your solution and why you should be chosen - automatically.

“WHY SHOULD I PICK YOU?”

PROVE YOU ARE THE TOP CHOICE. USE SEVERAL BEST PRACTICES TO QUICKLY AND CLEARLY EXPLAIN YOUR SOLUTION AND WHY YOU SHOULD BE CHOSEN - AUTOMATICALLY.

## NO BEST PRACTICES

- Poorly designed
- Not customer focused
- Inconsistencies in narrative and aesthetics
- No clear discriminators
- Poorly written and edited
- Content does not align with RFP
- Lack of evidence or proof

**EXECUTIVE SUMMARY**  
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**Customer**  
• Mission  
• Vision  
• Budget  
• Existing needs

**New Tech**  
• Related experience  
• Applicable expertise  
• Quantitative data  
• Qualitative info  
• Awards

**Difinity**

- A • Specific details
- B • Specific details
- C • Specific details
- D • Specific details

• Automation  
• Transparency  
• Improved risk avoidance and mitigation  
• Increased efficiency  
• Faster issue resolution  
• Empowered FTEs  
• Key outputs

**MAKES TASKS EASIER**  
**DIMINISHED COST**  
**BEST RESOURCE WITHIN ORGANIZATION FOR IT SUPPORT**

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Tasks simplified with Definity's advanced automation in the first 12 months. Customer Name Project X DIFINITY™ lobortis nisl ut aliquip ex ea commodo consequat. Duis autem vel eum irure dolor in hendrerit in vulputate velit esse molestie consequat, vel illum dolore eu feugiat nulla facilisis at vero eros et accumsan et iusto odio dignissim qui blandit praesent luptatum zzril delenit

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**Advanced Quality Control**

Track Performance Metrics → Analyze Performance Metrics → Adjust Workflows via Machine Learning + AI → Real Time Reports via Customer Portal

24x7x365 Automated Drive Assessment, Diagnosis and Repair

**SECURITY:** Quis nostrud exerci tation lobortis nisl ut aliquip ex ea commodo consequat Duis autem vel eum irure dolor in hendrerit in excedis requirements consequat, vel illum dolore eu feugiat nulla facilisis at vero eros et accumsan et iusto odio dignissim. Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet.

## BEST PRACTICES

- Professionally designed
- Succinct, specific, consistent customer focused narrative and messaging
- Clear discriminators
- Content structure aligns with RFP
- RFP section references
- At a glance callouts and graphics
- Quantitative evidence
- Highlight important information

**EXECUTIVE SUMMARY**  
Customer Name simplifies tasks, lowers cost 18%, and remains the customer center of excellence for IT support with New Tech's DIFINITY™ automation solution as proven on Customer's Project X. Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat.

**New Tech Advantage**

**CUSTOMER**  
• Mission  
• Vision  
• Budget  
• Existing needs  
• Requirements  
• Regulations

**NEW TECH**  
• Related experience  
• Applicable expertise  
• Quantitative data  
• Qualitative info  
• Awards  
• Accreditations  
• Key staff  
• Discriminators

**DIFINITY™**

- Automation
- Transparency
- Improved risk avoidance and mitigation
- Increased efficiency
- Faster issue resolution
- Empowered FTEs
- Key outputs

**SIMPLY TASKS**  
**LOWER COST 18%**  
**CUSTOMER CENTER OF EXCELLENCE**

**CLOUD:** Ut wisi enim ad minim veniam, quis nostrud exerci tation ullamcorper suscipit lobortis nisl ut aliquip ex ea commodo consequat. Duis autem vel eum irure dolor in hendrerit in vulputate velit esse molestie consequat, vel illum dolore eu feugiat nulla facilisis at vero eros et accumsan et iusto odio dignissim qui blandit praesent luptatum zzril delenit augue dais dolore te feugait nulla facilisi.

**92% OF TASKS SIMPLIFIED WITH DIFINITY'S ADVANCED AUTOMATION IN THE FIRST 12 MONTHS.**

Customer Name Project X DIFINITY™ lobortis nisl ut aliquip ex ea commodo consequat. Duis autem vel eum irure dolor in hendrerit in vulputate velit esse molestie consequat, vel illum dolore eu feugiat nulla facilisis at vero eros et accumsan et iusto odio dignissim qui blandit praesent luptatum zzril delenit

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**CLOUD PERFORMANCE METRICS:**  
RISK Reduction: 60.000  
SOPS: 60,000  
LATENCY: 1ms  
MTBF: 2,000,000 hours

**Advanced Quality Control**

Risk Reduction Metrics → Analyze Performance Metrics → Adjust Workflows via Machine Learning + AI → Real Time Reports via Customer Portal

24x7x365 Automated Drive Assessment, Diagnosis and Repair

**SECURITY:** Quis nostrud exerci tation lobortis nisl ut aliquip ex ea commodo consequat. Duis autem vel eum irure dolor in hendrerit in excedis requirements consequat, vel illum dolore eu feugiat nulla facilisis at vero eros et accumsan et iusto odio dignissim. Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet. Quis nostrud exerci tation lobortis nisl ut aliquip ex ea commodo consequat. Duis autem vel eum irure dolor in hendrerit in consequat, exceeds requirements illum dolore eu feugiat nulla facilisis at vero eros et accumsan et iusto odio dignissim.



BEST PRACTICE

ANNA  
MAYSEY-WELLS

# THE DREADED QUESTION - MUSINGS ON MEANING

**I CAN FEEL IT COMING, EVERY TIME I SIT WITH A NEW STARTER IN THE FIRM AND EXPLAIN WHAT MY TEAM DOES. THE QUESTION. THE DREADED QUESTION. ‘HAVE YOU GOT AN EXAMPLE OF BEST PRACTICE WE COULD LOOK AT?’ 45 MINUTES OF GOING THROUGH PROCESS, CONTENT LIBRARIES, TEMPLATES, POLICIES, YOU NAME IT - AND IT ALWAYS, ALWAYS COMES BACK TO THAT QUESTION.**

It's not an unreasonable question. Frankly, it's a question I myself have asked in interviews (and I might as well use this platform to apologise to any of my previous interviewers when I asked that question without really understanding what I was asking). The problem is, despite the best efforts of the APMP, bidding best practice cannot be applied to every bid in every industry. I remember thinking when I was studying for my Foundation exam it must be amazing to work in one of these places where you have sales managers, content writers, bid managers, design teams and so on. Often you're lucky if you have enough bid specialists to manage the number of bids coming in without having to drop something else (let alone the rest of it). More commonly all those tasks are just another part of your everyday role. Most bidders I know, across a variety of industries, have to find a way to do it which works for the resources we have.

So how do you answer that question? How do you demonstrate best practice? I know for many people an example of best practice is the bid which won the biggest deal - but is that best practice or just very satisfying? I know I have written and produced bids which looked fantastic, ticked all the boxes and showcased a fantastic win strategy but we lost it on pricing, or because the process failed us. By contrast, the bids which we have pulled together in record time in response to an email (which are definitely not examples of "best practice" but make up a decent proportion of the team's work) are the successful bids more often than not.

Because of all this, the idea of what "best practice" means feels a bit subjective. In my team we have the same set of standards we hold every bid to, absolutely. These standards start with asking the basic questions ("Have we supplied everything the client asked for and answered all the questions?" "Are we within the specified word count throughout?") and continue with asking more involved ones ("Is our win strategy clear?" "Is the bid client-focused rather than talking about us?"). Are these

questions examples of best practice or processes tailored to the needs of the team (much like our bids are tailored to the needs of our clients)? It seems the phrase "best practice" is not describing "a set of working methods which are officially accepted as being the best to use in a particular industry" (thank you *Cambridge Dictionary* for the helpful definition). Instead it is a catch-all phrase asking, "When it comes to how you bid, what works best for you?"

In law, bidding teams don't tend to be enormous; if they are, bid specialists are aligned to a particular area of the law rather than being jacks-of-all-trades. We develop ways and means of managing bids efficiently and effectively which don't necessarily follow APMP or Shipley standards. Instead we use elements of and are influenced by those standards to create a broad process and a communal goal for the team. It's why to be a bid person you need that very particular combination of a Type A personality and the ability to quickly adapt and revise your plans - because you never know what you might face from one RFP to the next!

So again - how do you answer the Dreaded Question? The truth is I don't; not really. Not in the manner which most would expect anyway. I don't provide examples of snazzy bids we have previously won or deliver a highly detailed training session in what steps you should follow for every bid - because in my experience you cannot treat every bid the same way. Instead, I respond "We don't have one particular example of best practice here."

What I mean by that is every bid is done to the highest standard possible given the time, resources and involvement of the fee earner available. Some days that looks like industry-approved best practice. Some days we sit back and say, "We've done our best". And other days, it can look a bit like we're just rolling the dice.

**“ HOW DO YOU ANSWER THE DREADED QUESTION? THE TRUTH IS I DON'T. SOME DAYS WE SIT BACK AND SAY, 'WE'VE DONE OUR BEST'. AND OTHER DAYS, IT CAN LOOK A BIT LIKE WE'RE JUST ROLLING THE DICE. ”**



“ THE THINGS WE USED TO VIEW AS BEST PRACTICE ARE NOW MERELY GOOD, MERELY NORMAL. THE BAR HAS BEEN RAISED - SIGNIFICANTLY. WE’VE REACHED BIDS 2.0 - BUT OUR JOURNEY IS FAR FROM DONE ”



JON WILLIAMS

# GOOD IS THE NEW NORMAL

I can't wait for October's APMP UK conference. It's been too long since we last gathered face-to-face as a profession; too long since we spent time in a room with colleagues who face the same issues - and share the same joys - of life as a bid and proposal professional.

I have one slight hesitation, though, thinking back to the last of these events in 2019. Sponsors of the event are given stands: ours was right at the end of the exhibition area. And I remember standing next to ours, looking out over the crowd, and thinking: "I'm one of the old folks."

Given I set up my first bid centre not long after I'd turned 30, and then co-founded APMP UK with Chris Whyatt soon after - that came as something of a shock. And it led me to reflect on the journey we've come on as a profession.

I'm fortunate to get to spend time with bid folks from numerous organisations around the world when running courses or bid workshops. And the joy of those sessions for me isn't just about imparting enthusiasm and ideas: it's about listening to the experiences of those in the (real or virtual) room.

And you know what? Those experiences have changed so very much. Let me share a few examples.

I'll often tease about the "bid/no bid" decision. "Do you have a qualification process in your organisation?" "Yes," people confirm. "Then you never find yourself working on a bid where you're not confident you're going to win, or without the necessary resource?"

Years ago, people laughed and shook their heads. Now, many nod. What used to be best practice is now merely good.

"Do you work with your sales teams before the RFP lands?" In the past, people looked incredulous: where would they find the time in the merry-go-round of responding? Now, capture and pre-proposal planning are de rigueur for so many.

I share examples of (suitably redacted) proposal design, carefully crafted by my team. The stuff I show is probably an eight out of ten: not the very latest or most leading work by our designers, but enough to illustrate key principles. I ask attendees to give a comparative score their own bids, from a design perspective. A few years ago, it was threes and fours. Now, I hear lots of sevens and eights.

Over the years, too many libraries of pre-written content have merely enabled their organisations to write poor proposals faster. Now, for so many, they're more carefully curated, adding far more value.

And so on... Things that challenged us in the past are still challenges for many, of course. Not every organisation really "gets" the power of the proposal process as a source of competitive advantage (yet).

The things we used to view as best practice are now merely good, merely normal. The bar has been raised - significantly. We've reached Bids 2.0 - but our journey is far from done.

I see clear parallels with the world of procurement, where I started my career. Back in the day, "buyers" had no real voice at senior levels: now the chief procurement officer is a key contributor in board-level conversations. But when did you last meet a chief proposal officer?

Best practice has to be striving for true influence at the top table. Campaigning to ensure that bids and proposals are high on the radar of the C-suite, recognised as the value generation engine for much of the organisation.

It's only with that senior sponsorship we'll truly embed the processes and behaviours that enable us to contribute to exceptional growth in revenues, jobs and profitability. To move away from the continual fight for attention, buy-in and resources that characterise life for too many in our profession today - to a world where the red carpet in the (perhaps virtual) office leads straight to the door of the bid centre.

And then that "best" practice, that Bids 3.0 - will feel like merely the new good practice, and we'll need to push still further. Bids 4.0, anyone?!



“ OVER THE YEARS, TOO MANY LIBRARIES OF PRE-WRITTEN CONTENT HAVE MERELY ENABLED THEIR ORGANISATIONS TO WRITE POOR PROPOSALS FASTER. NOW, FOR SO MANY, THEY'RE MORE CAREFULLY CURATED, ADDING FAR MORE VALUE ”





# BEST PRACTICE IDEAS THAT YOU CAN PUT INTO PRACTICE TODAY

TONY BIRCH

The Cambridge Dictionary defines best practice as “A working method or set of working methods that is officially accepted as being the best to use in a particular business or industry, usually described formally and in detail.”

In other words, best practices are the best way to do things that have been developed through observation, trial and error.

In the bids and proposals world, organisations that want to be more successful in winning business have looked at their own and other organisations’ objectively measurable and successful practices. They have defined what the best practices are that have led to success and implemented those in their own organisations. The most successful organisations re-evaluate and improve their best practices constantly.

When you submit your bid, you want the evaluators and decision makers to feel positively towards you. To help you achieve this, the following table provides a list of 20 best practice ideas you can put into practice today.



## EVALULATOR REACTIONS AND RELATED BEST PRACTICES

**All my requirements have been addressed and all my instructions have been followed. This was so easy to evaluate correctly.**

- 1 Identify and follow the customer’s submission requirements.
- 2 Adopt the customer’s numbering scheme, to make it easy for the customer to find the answers they need.
- 3 Make it easy for the evaluator to understand the level of compliance of your bid against the requirements by providing references to the detail in your bid, which support your claims of compliance. Highlight where you are compliant. Justify and mitigate where you are not compliant.

**This bidder clearly understands both our requirements and business issues.**

- 4 Include an Executive Summary that identifies the customer’s business issues and provides a high-level description of how your solution will address them.
- 5 Ensure the customer’s name is mentioned first and more often than yours and the bid is written around the customer’s issues.
- 6 Ensure the majority of features contained within your solution are linked to quantifiable business benefits for the customer.

**It is obvious to me why this bid should be selected.**

- 7 Include value propositions, rather than prices alone.
- 8 Quote previous customers’ references, about relevant past project successes, that substantiate the capabilities that you are offering in the bid.
- 9 Include at least one paragraph in the bid’s Executive Summary on how you will manage the customer’s risk.

**It is obvious to me why this bid is better than competitive bids.**

- 10 Without naming any competitor, outline a competitor’s likely solution approach and explain to the customer why you did not choose that solution approach yourself.
- 11 Without naming any competitor, downplay the benefits to the customer of a likely competitor approach, particularly one that is directly connected to one or more of the customer’s key issues.
- 12 Without naming any competitor, highlight differences between your and your competitors’ solutions to the customer, in areas that matter to the customer.

**Great! This bid is well organised, clear and correct.**

- 13 Carefully proofread the first few pages of your bid. If you find any spelling or grammatical mistakes, make sure that the whole document is proofread by someone who has not been involved in its creation before it goes out.
- 14 Count the number of words in five randomly selected paragraphs. If the average paragraph length is more than 50 words, consider revising the bid to reduce the average paragraph size.
- 15 Ensure your bid does not contain any unnecessary jargon and that only “industry-standard” terms are used.

**The graphics used in this bid really saved me reading a lot of words and clearly communicate their major selling points.**

- 16 Think about creating/using visuals before writing the text. Aim to include an average of two visuals in every three pages of the bid document.
- 17 Ensure most of the visuals in your bid have supporting captions.
- 18 Ensure the purpose of the visuals you use are understandable in under 10 seconds and the reasons for their inclusion are obvious.

**This bid is professionally presented and easy to evaluate. Unlike most bids, I would willingly evaluate this bid again if I had to.**

- 19 Your bid design layout makes appropriate use of emphasis devices for key messages – such as white space, frequent headings, use of colour, bold fonts, etc.
- 20 Use “informative headings” throughout the bid which summarise the information the reader will find below that heading.

“YOU DON’T NEED TO PRACTICE BEST PRACTICES TO KNOW WHAT THEY ARE. HOWEVER, THE MORE YOU PRACTICE BEST PRACTICES, THE BETTER YOU WILL GET AT THEM.”





**I MAY GET SHOT DOWN IN FLAMES FOR THIS ONE, HOWEVER, HERE GOES... MY NAME IS PIPPA BIRCH AND I DO NOT FOLLOW APMP'S BEST PRACTICE IN MY WORK**

I may be one of the very few in the world who has every single flipping certification available, but I do not follow the Body of Knowledge (BoK) word by word. Although it is probably the only certified 'best practice' we are exposed to in the world of bids and proposals, much of it is irrelevant to my work as a UK-based bid consultant focussed on public procurement. I had years of experience before I found the APMP, have access to several bidding books by others, and good old Mr Google has his benefits in some situations.

**"So why on earth get all those APMP badges then?", I hear you ask.**

Because the APMP is the only recognised professional body dedicated to our profession which allows me to demonstrate to my clients that I know what I am talking about (please correct me if I'm wrong). My knowledge has been validated by someone other than me. And clients like to see badges. As well as to win, obviously, and we help them do that all the time.

I took my APMP Foundation about three years after I went freelance. At that point, I realised I needed to seek some sort of continued professional development. The Shipley (other Approved Training Organisations are available) two-day writing course caught my eye as the only thing that seemed to be around at the time on Google. So I invested in myself and toddled off to London, where I was bamboozled by quite a lot of jargon I'd never heard of, in what I had been doing for many years. Had I been doing it wrong all this time or did I just not understand as it was so American? Despite these worries, I threw myself into it, discovered my bidding 'Dad' in Tony Birch, and achieved my Foundation. This was the springboard to being introduced to an amazing community of people who understood what I did.

**"Wait a minute!", you shout, "But you don't use it in your daily work? Why on earth not?"**

Because I built up my own successful way of doing things over the years before I found the APMP. Much of it is similar to be fair – planning, checking out the competition, storyboarding, reviews, action captions, etc. I even developed a comprehensive Bid Management System, based on ISO standards, that continues to provide excellent value to my clients' commercial, precontract and operational teams (blows own trumpet). Although quite often the reason is we just don't have time to implement best practice – certain corners have to be cut (sensibly) to get a compliant submission in.

**"We are still confused..."**

APMP best practice works, as long as those of us in the UK tailor it to our own, successful methods. It works as long as we approach it with the knowledge we do not have to rigidly follow it chapter and verse. It's about making a professional judgement on the people, bid requirements and timescale available.

I want to pare APMP best practice down for smaller organisations. It is so focussed on large corporate bid teams that it forgets about the small companies with little or no bidding function. That's where we, as consultants, can come in with a stripped back, simpler version of good practice; scalable for all situations. Writing this also reminds me that I have a Pipster system of 'how to do bidding stuff' in the pipeline (that catchy title may well be changed). I just need to spend some time on it. I know there is also a new standard to come from our friends at APMP, working with BidCraft and BSI, who are UK-based companies. I am really looking forward to seeing what this is all about.

Ultimately, I think there might be room for something else that is focussed on promoting our profession and best practice specifically to the UK market. Something that embraces good practice from across the UK – there is some great stuff out there. Something the people we work for will understand, alongside the APMP's work. A conversation for another day perhaps?

**"So what value does APMP hold in terms of best practice for you?"**

Since I took that very first Foundation course, I've gone on to get all the certifications, as well as coach others in their Practitioner and Professional courses, and mentor other APMP UK members aspiring to improve their career prospects. At present, I do think the APMP best practice is a good foundation for all things bidding, and for those learning their trade. The only one I know of. In fact, I have invested a lot in my team attaining their certifications, including the Bid and Proposal Apprenticeship.

**I think I want to revisit my first statement.**

**MY NAME IS PIPPA BIRCH AND I DO USE THE STRUCTURE AND THE FLAVOUR OF BEST PRACTICE FROM THE APMP TO ENSURE I CONTINUE TO HELP MY CLIENTS WIN**

And they **are** winning. That's why we do this stuff. I will continue to champion APMP best practice, certification and the bidding community. But I will also continue to do things in my own way, a way that works for me, my staff, my clients, and the situations I am faced with. I will also seek out new ideas and ask those around me for their opinions and experience. I will constantly evolve my offering to my clients while championing excellent practice from every source.

PIPPA BIRCH

**THERE IS MORE THAN ONE WAY TO SHOE A HORSE...**





# EVERYONE MAKES MISTAKES

MIKE READER

I found myself sitting in a room of very clever peers, aged 17, with no real idea what I wanted to do when I grew up. I'd managed to talk my way onto the Year in Industry (YINI) programme run by the Royal Academy of Engineering and now found myself at the inauguration event.

Twenty years ago, the YINI programme was only available to the best of the best. I was definitely an imposter in a room full of people heading to Oxford, Cambridge and Durham. The programme team had pulled in some serious heavy hitters to talk to our group of high performers. Whilst I can't say I remember many of them, one talk has always stuck with me.

An impeccably dressed, ex-chairman of a major global energy company stood in front of us and talked about his life. His experiences. What he brought to the businesses he worked with. And then after impressing everyone with his extra-long CV, he asked a question.

*"If I went for an interview to secure a C-suite job today, what would stop me getting it?"*

Responses from the room were all batted away.

*"Too experienced"* was met with *"experience is what employers need."*

*"Not based in the right location"* was responded to with *"I'll move for the job. I've always moved in my career."*

*"Don't fit in with the business culture"* was answered with a very succinct summary of how he was perfectly aligned with the culture of this imaginary business.

But there was a reason, he told us, as to why he might not get the job.

**People make mistakes.**

Despite being the most qualified and best suited for the job, he still may not be selected because the recruiters make a mistake. We make mistakes all the time. In decisions about our lives and our work. And, in procurement, clients make mistakes all the time in their assessment of our submissions.


Despite what APMP or any consultant will tell you, there is no perfect formula for a winning bid. We do all we can to put ourselves in the best possible position, using intuitive and efficient processes, calling on the industry's leading subject matter experts and crafting a response so compelling that Jon Williams would be proud. But in my experience, the roll of the dice that is the assessment process of any bid means you can never be 100% certain.

This means whilst we may look fondly at the great bids we've produced, the ones we'd be happy to share around the business and use as an exemplar in training or knowledge shares, the truth is the bad and the ugly can still win.

I've had many bids which I've hated after they've been submitted. They've been rushed, they've been too generic, they've not had the attention I would love to have given them. But they've still won. And I've had bids that I'm completely in love with, that I've slaved over for months, only to come short when the scores are laid bare in our feedback letter.

I do firmly believe that whilst we should strive for best practice, consistency and "good" every time, we cannot miss the element of luck that always exists in bidding. And in judging ourselves, we need to reflect on how luck impacts on the perfect win rate or the perception of colleagues in our businesses.

I wanted to contribute this article to BQ14 because I've stopped judging myself more and more on individual wins and losses. After 15 years in the industry I can list the bids I never should have won and the bids that got away – but I've come to realise the pursuit of improvement is a much better focus of my time than worrying about individual wins and losses. As an industry we need to be much more focused on the journey of improvement, rather than meeting an arbitrary "best practice" standard, and enjoy that journey through the good, the bad and the ugly.



“ THIS MEANS WHILST WE MAY LOOK FONDLY AT THE GREAT BIDS WE'VE PRODUCED, THE ONES WE'D BE HAPPY TO SHARE AROUND THE BUSINESS AND USE AS AN EXEMPLAR IN TRAINING OR KNOWLEDGE SHARES, THE TRUTH IS THE BAD AND THE UGLY CAN STILL WIN. ”

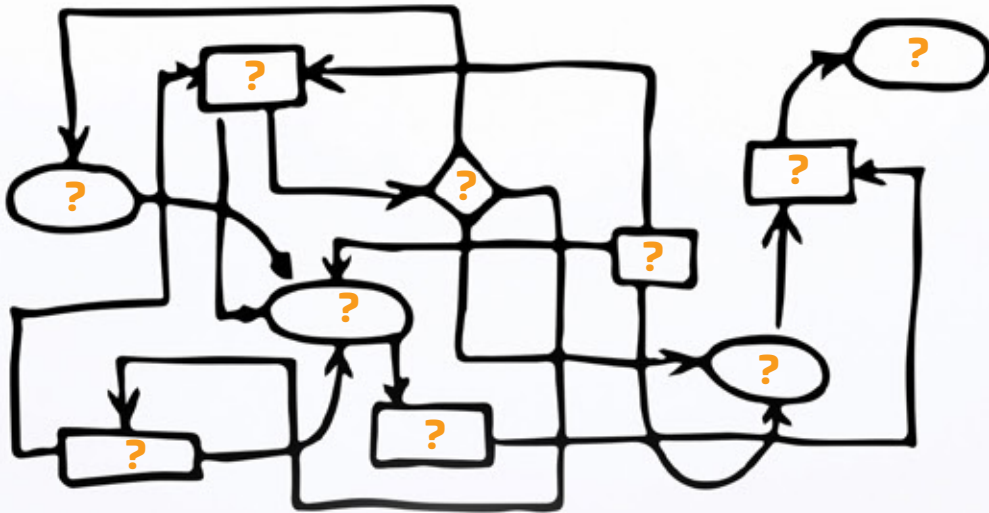


# IS THERE A 'GOOD', 'BAD' OR 'UGLY' METHOD TO BIDDING, OR JUST A DIFFERENCE IN FOCUS?

ALISON ZALECKI

**“BY FOLLOWING A STRICT PRESCRIPTIVE METHOD, WE BECOME DUMBER, BECAUSE WE LOSE THE ABILITY TO THINK FOR OURSELVES.”**

Mo Gawdat, former Chief Business Officer, Google [X]



I've never followed strict processes throughout my bid career. I like consistency in filing, housekeeping, feedback and writing style, but not much more. Sure, I keep a set of loose principles (you can't do/know some things without knowing others) but I'm not beholden to this.

Priorities are different from company to company, and so is the approach between in-house bidding teams and outsourced freelancers/consultants. In-house teams focus on one company – the one they work within. They can build a deeper knowledge of the business, their capabilities, people and what makes them different/better.

Outsourcers often work for many different companies. The upside is they get to see what each are doing better, worse, differently, to the other and can apply this advantage to each bid. The downside is they have a lot less time to get under the skin of each company, build relationships, and find the information they need.

So, I question if there is a 'good', 'bad' or 'ugly' method to bidding, or just a difference in focus. It's made me look at where our approach at Mozer sits amongst this. We're an outsourced bid consultancy and we've recently grown from one to five people. I came from a Head of Bids role at a national property company and I've been running Mozer for nine years now, so it's been a while since I was in-house. We have two freelancers who recently took the leap from their in-house roles and we contract them in on major opportunities or bid retainers with our clients. We also have two permanent members of the team who have recently joined us from in-house bid team roles. All team members are learning to adapt to this shift from in-house to outsourced/consultancy. Here is what we've learned about in-house versus outsourced best practice, and what they tell me Mozer specifically does differently.

Working on bids in-house versus outsourced	
In-house	Outsourced
<ul style="list-style-type: none"> <li>Apply consistent processes and best practice; bid/no bid, forms, software, templates, thresholds for support</li> </ul>	<ul style="list-style-type: none"> <li>Navigate a client's processes/structures built by their in-house bid team</li> <li>Build some best practice into processes for regular clients</li> <li>Unable to put anything concrete in place for new/occasional clients</li> </ul>
Mozer	
<p>We have processes like a New Project folder, Project Programme, Bid Overview template, Timesheets, and Live Project sheet. We clearly file name everything so they're easy to find when facing a bidder's mind blank. We complete a lot of bids in a short space of time, so we determine what processes are critical.</p>	



Staying on top of your housekeeping	
In-house	Outsourced
<ul style="list-style-type: none"> <li>Update a bid library at the end of a bid if there's time</li> <li>Forget where the good bits are</li> <li>Fail to maintain records of bidding activity when it's not seen as business-critical</li> </ul>	<ul style="list-style-type: none"> <li>Add content straight to the bid library during and after every bid</li> </ul>
Mozer	

Time management is fundamental when juggling multiple bids with many different clients. We house images, case studies, and other content directly into a client library during a bid so it's there ready to use again for the next bid. We don't wait until the end of a bid. We also give clients a copy of this to help tackle a bid when they don't need us. We version control every document so when we cut down a good response to meet limits, we take from the most detailed version for the library.

Getting useful feedback	
In-house	Outsourced
<ul style="list-style-type: none"> <li>Chase and review feedback directly</li> <li>Don't always share feedback with the wider business</li> <li>Often fail to make content improvements ready for the next bid</li> </ul>	<ul style="list-style-type: none"> <li>Analyse bid feedback where the client has bid to the same end client on multiple occasions, to identify patterns</li> <li>Summarise and report so everyone can improve</li> </ul>
Mozer	
<p>We have more control over bid content and can influence how we learn from previous client feedback. We share feedback with all contributors (client and consultants) and remind them of it when we start the next bid. We're hot on this and don't rely on others to look back on previous feedback/scores.</p>	

It's pretty standard, and even accepted, for in-house bid teams to work across too many bids at the same time. It's the same for consultants, but with the added pressure/responsibility to give clients the top-quality service they're paying for.

Mozer has been in business for nine years. Until recently I worked long hours, seven days a week. I've learned how to be incredibly efficient and logical with my time and approach. Working across multiple companies – from local SMEs to major global brands, with and without bid teams – I have taken the best from them to build what my colleagues tell me is a very smart way of doing things. Which result in big wins for our clients!

Scrapping answer plans	
In-house	Outsourced
<ul style="list-style-type: none"> <li>Produce document(s) with multiple categories for the bid writer/subject matter expert to fill in</li> <li>Provide prompts/questions</li> </ul>	<ul style="list-style-type: none"> <li>Produce a structured first draft template for the writer to follow when answering the question</li> </ul>
Mozer	
<p>Answer plan templates are often complex, with multiple categories, questions, and minimal space for responses making it a deceptively big document. Mozer lays out the question number, title/question, score, and limits at the top of the document. Then we include Level 1 subtitles (mirror the main parts of the question), Level 2 subtitles (main points to cover), and guidance text (information we expect to see). This creates a single space for the writer to populate (without working across an answer plan) and a first draft document.</p>	

Setting and nailing deadlines	
In-house	Outsourced
<ul style="list-style-type: none"> <li>Set deadlines at the start</li> <li>Hold review meetings</li> <li>Check in when approaching a deadline</li> </ul>	<ul style="list-style-type: none"> <li>Hold review meetings</li> <li>Review deadlines</li> <li>Speak to clients almost daily</li> <li>Check in advance the client can still meet the internal deadline</li> <li>Issue reminders</li> </ul>
Mozer	
<p>Mozer's regular clients know how often we will chase them on actions and deadlines. They quickly learn that if they agree to a date, they have to stick to it. At kick off, we send an email with the action and send another email/make a call in the run up to the deadline. We then set a diary reminder in their calendar the morning of the deadline to alert them before the end of the day. No excuses left.</p>	

### Top three things to implement

- 1 Don't over-process** – Too little and things get messy; too much and you stop adapting to the specific situation.
- 2 Stay organised** – Don't just move onto the next bid/deadline and forget about the last. Extracting useful info from the bid and following up for proper feedback will save you so much time later and improve your responses.
- 3 Be persistent** – Check in with contributors long before the internal deadlines. Email, ring (we find senior people prefer a text) and set reminders.

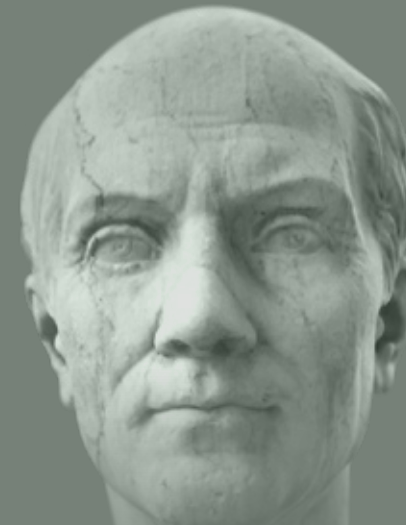




JOE RILEY

CREATING  
FERTILE  
SOIL FOR  
YOUR

EUREKA!  
EUREKA!  
MOMENT



**EUREKA MOMENT (NOUN):**  
**'A MOMENT OF SUDDEN, TRIUMPHANT DISCOVERY, INSPIRATION, OR INSIGHT'. ASSOCIATED WITH ARCHIMEDES - A PHYSICIST AND MATHEMATICIAN WHO DISCOVERED THAT THE BUOYANT FORCE ON AN OBJECT SUBMERGED IN A FLUID IS EQUAL TO THE WEIGHT OF THE FLUID DISPLACED BY THAT OBJECT.**

Eureka moments happen all around us in all walks of life – in technology, academia, art and science. Take literature and the dearly held London Library. Unbeknownst to us at the time, my wife and I were expecting as we watched a Dracula play at the library in the spring of 2019. Bram Stoker researched and wrote in that very room, in surroundings that had inspired great thinkers like Charles Dickens, John Stuart Mill and Harriet Martineau. The writing process wasn't easy for Stoker. He spent seven long tortuous years figuring out what parts of his plot made his tale tick while succumbing to frequent bouts of self-doubt and self-questioning. Moments of unexpected inspiration and insight were made possible by time as the plot refined. Dracula eventually became his magnum opus. His best work.

For some work winners, 'best practice' conjures up a process which suggests a positive outcome is more likely if we follow a sequence of activities undertaken in a particular way. APMP's Body of Knowledge offers plenty of resources to that effect. Yet I've observed (as I suspect others have) a bid manager taking two separate Subject Matter Expert (SME) teams (made up of technical and/or creative experts) through a 'best practice' bid process with differing quality outcomes. My diagnosis: 'best practice' means practice that determines 'best thinking'.

Best thinking in this context is about who can develop the better idea; the better solution; the better presentation of a concept or argument; the better return on investment case for the buyer. For how far can process take us in terms of generating a moment of ingenuity or an innovation that makes a market, or blows up an orthodoxy, or changes a paradigm? Two practices have been present when I've been in teams that have blown away the competition despite starting on an equal footing. If repeated, they produce better results than without. These "Eureka!" inspiring (best) practices entail:

**1** Executing strategic capture to cultivate a "Eureka! Eureka!" moment. We rarely have the seven long and tortuous years afforded to Bram Stoker. But when we do have substantiated knowledge of a client's requirement prior to tender release, we have time to think deeply about the most impactful solution. And to think deeply with time is to encourage a sort of serendipitous moment in which inspiration strikes and the outcome of the imminent tender takes on a new destiny towards an inevitable conclusion. That is, company A has conceived of a remarkable idea or solution the competition cannot match in the time afforded between tender release and submission deadline. I recall successfully positioning for a contract engaging EU Member States to solve a common policy challenge. By forensically mapping out the wants and needs of all countries in advance, we had a "Eureka!" moment enabling us to create an attuned stakeholder engagement plan using unearthed data insights. The process took months - longer than the time our competition had between the tender launch and submission date. We used time to our competitive advantage to outthink our rivals and produce the best proposal.

**2** Diversity is our strength - drawing on the A-team and sparking cognitive conflict. Every bid manager will have individual SMEs in mind who enhance win probability (Pwin) by their presence. These SMEs have the temperament, intellect, experience, and self-awareness to combine as a team in a way that makes 1+1 = 3. These A-teamers are often the strongest client-centric communicators who see the big picture of how the solution being sold sits within the arc of the client's place in the world. That's not all. Best thinking often occurs from carefully managed cognitive conflict. There is wall-to-wall literature on this subject, particularly with respect to minimising group think and widening perspectives, while improving client empathy and decision making. Business Development-led solutioning workshops and design sprints can maximise cognitive conflict when done skilfully. This in turn drives innovation, ideation, and better thinking to produce the strongest (best) proposals.

Competitive tendering dynamics are often a microcosm of why a business exists in the first place – to solve a client's challenge and to add greater value than competitors. Whether we grasp our position in the market through Porter's Five Forces, or Blue Ocean Strategy's value innovation, or the like, companies that thrive typically do so because they outthink and adapt better than their rivals.

Professor James E. Schrage wrote in his case study - Three Strategy Lessons from GE's Decline - that "All growth from any single market or technology will end. Companies that endure are those that plan for this reality." I suppose this reality is fundamental to reasoning why work-winning best practice should mean repeatable ways to increase the likelihood of outthinking and outmanoeuvring a forever evolving market.



# CAN WE ELIMINATE THE BAD AND UGLY?



It doesn't have to be bad or ugly. Sometimes we don't have the time or resources to make a pitch great, but almost all the bad and ugly ones can be made better with improved quality and consistency. Remedies include starting with better templates and content, the use of technology, and training. We opted for all three, but specifically technology, in my role as global pitch director for a large law firm. When we had the opportunity to deploy pitch automation software, we saw how the bad and ugly improved and the good got better.

## LATEST AND GREATEST CONTENT AVAILABLE

Using pitch automation technology, all pitch materials were housed in one central library. Very little content needed to be created from scratch, so the starting point for anyone working on a pitch document was better. And while content was stored in a central location, it was still owned by the team or person responsible for updates, ensuring it could not be overwritten.

We reduced middle-of-the-night outreach to contributors and scrambles to find the right content owner because content was updated on a schedule. When the annual report was released, for example, all financial, personnel and D&I content was updated. There was no worry about terminology or language being compliant with organisation standards because materials were already reviewed, edited, approved and in alignment.

## TEMPLATES

A pitch template is a document the technology uses to know what parts of the proposal go where. For example, a standard template may have an opening letter, executive summary, solution approach, team, timeline, and pricing. The template is pre-formatted and uses the organisation's branding.

The use of good templates is key to use of technology, as it helps guide non-experts through what a good proposal looks like. Templates keep the documents coming out of the organisation consistent and branded. Templates can also be adapted for different divisions or geographies of an organisation, and graphics can be adjusted to suit the taste of pursuit leaders. When best practices are built into the templates, everyone is able to produce a better document.

“ **TECHNOLOGY IS HELPFUL IN IMPROVING THE BAD AND THE UGLY, AND HELPS MAKE THE GOOD EVEN BETTER... BESPOKE CONTENT GETS MORE TIME AND ATTENTION BECAUSE STANDARD CONTENT IS READILY AND RELIABLY AVAILABLE** ”

## TRAINING

Using technology and templates reduced ramp-up periods for new team members. Prior to a one-stop-resource for all pitch material, training took months. New employees had to learn what was kept where throughout the global organisation, as well as whom to go to for changes or newly approved materials.

With the use of tech:

- **All materials are in a central location - experience, case studies, and team biographies are easy to locate and use or edit**
- **Determining the owner of content is simple and straightforward – should changes be suggested mid-proposal, tracking down the content owner for approval is much easier**
- **All past pitch documents are available – if content is needed from a pitch last year, finding it is much easier**

These factors greatly reduce the time it takes for new team members to learn their way around and begin producing high quality materials.

In my experience, some of the worst pitches come from non-pitch people throughout the organisation. In their defence, they were asked to pull together a proposal document last minute and had no idea where to start (and, for whatever reason, did not reach out to the pitch team). Those pitches would have been much improved by having technology and templates to guide them, and updated content to populate them with. If an entire organisation has access to the pitch automation system, the very worst pitches can be made significantly better and some of the strain on the pitch team can be alleviated.

Technology would be equally helpful in locations where pitches were not submitted in English, and local teams had the ability to translate, then store content in local language rather than starting from scratch every time. Better still, pitch automation software now includes an auto-answer function for common RFP questions, so even non-experts can get the best AI-suggested content when responding to RFPs.

Technology is helpful in improving the bad and the ugly, and helps make the good even better. Expert pitch team members are able to focus effort on the most read content, rather than thinking all parts of the document are equal. Bespoke content gets more time and attention because standard content is readily and reliably available. And, in turn, the expert team enjoys more job satisfaction, knowing their efforts and creativity are spent wisely.



## ABOUT OUR EXPERTS



**Martin Smith**

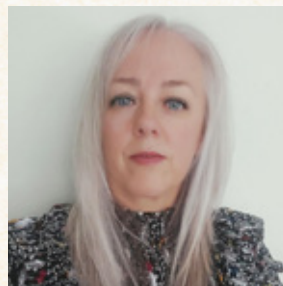
Martin is passionate about helping clients win new business. With increasingly savvy procurement professionals, more competition and new technology changing the way we bid, it is his job as Managing Director to ensure Bid Solutions provides market leading people, tools, training and solutions to help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



**Jon Darby**

Jon has 25 years' bid and capture experience in winning complex public sector tenders in the aerospace, defence, IT services and healthcare markets. This includes leading and managing international teams on deals worth up to £3.5 billion.

Jon received APMP UK's Industry Innovation Award in 2020. He is committed to advancing the bid and capture profession as a valued career of choice. He has volunteered on the APMP UK board for seven years (including as Chapter Chair). Jon regularly speaks at conferences, live events and webinars.



**Beth Wallace**

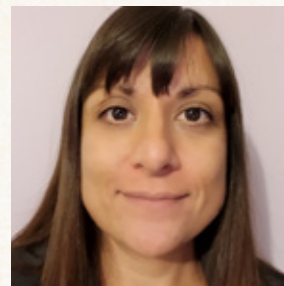
Beth has worked in a number of sectors, starting out in aerospace manufacturing but also working in financial services, media, hospitality and legal to name a few.

Her career has spanned both negotiating deals as well as managing supplier relationships, from simple projects to complex outsourcing.



**Rick Harris**

Rick has 32 years of association management experience, with the last ten years spent as the CEO of APMP. He is committed to the bid and proposal industry and has guided the association to a 100% growth in membership (now at 10,500+ members) over that time. With the help of APMP's Board of Directors, Rick created Bid & Proposal Con Europe™ and Bid & Proposal Con Asia™ to promote professionalism in the bid and proposal industry worldwide. He is APMP Practitioner certified and encourages all bid and proposal professionals to join APMP.



**Ceri Mescall**

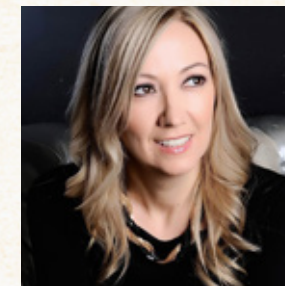
Ceri is a Work Winning Consultant based in Victoria, British Columbia, Canada. Over her 16-year career, she has enabled clients to secure over \$850 million in sustainable, profitable work. Ceri is one of only 19 people globally (as of March 2022) who holds all four Association of Proposal Management Professionals (APMP) certifications. In addition, she is an APMP 40 Under 40 Award winner (class of 2019) and an APMP Fellow (class of 2020). Ceri is a presenter/panelist, article author, and awards judge.

## ABOUT OUR EXPERTS



**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.



**Rita Mascia**

Rita's journey into the world of bids and proposal started while working for an award-winning language and culture business organisation. Rita is a bid professional with 21 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.



**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.

He works with businesses of all sizes to help them win more work.



**Carl Dickson**

Carl is the Founder and President of CapturePlanning.com and PropLIBRARY. He is an expert at winning in writing. The materials he has published have helped millions of people develop business and write better proposals. Carl is also a prolific author, frequent speaker, trainer, and consultant.



**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.



## ABOUT OUR EXPERTS



**Chris Kaelin**

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.



**Mike Parkinson**

Mike Parkinson is a geek. He is CPP APMP Fellow, 1 of 36 Microsoft PowerPoint MVPs in the world, best-selling author, and an industry thought leader. Mike's keynotes, training and books ("Billion Dollar Graphics" and "A Trainer's Guide to PowerPoint: Best Practices for Master Presenters") help companies succeed while saving money and time. He is a partner at 24-Hour Company, a premier creative services firm, and owns Billion Dollar Graphics.



**Anna Maysey-Wells**

Anna is a Senior Bids & Operations Manager. She has been working in bids for nearly ten years following a brief stint in journalism and freelance copywriting. She now specialises in legal professional services and leads a team at a Top 25 European law firm.

Anna is a strong advocate for work/life balance and equality for women in the workplace. She also contributed to the Pinnacle Pitch Management Survey 2022 alongside other esteemed bidding colleagues in the legal industry. When not popping up on LinkedIn bid posts, Anna enjoys travelling, pottering around the garden and winding up her nieces.



**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.



**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.

## ABOUT OUR EXPERTS



**Pippa Birch**

Pippa has been a Bid Writer for 20 years, working as an employee for major companies within the Highways and Civil Engineering Sector before going freelance in 2012. Pippa and her team write for companies across a variety of sectors (construction, facilities management, custody and forensics) although core clients are from highways and civil engineering. Pipster Solutions has become a successful, sustainable business with over 40 clients.



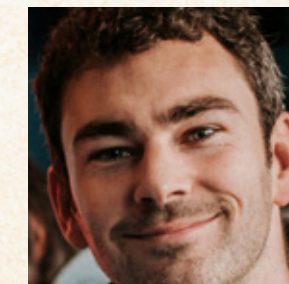
**Mike Reader**

Mike Reader is one of the UK's leading work winning professionals, helping senior leaders navigate the bidding and sales world. He leads a specialist team at Mace who work across all continents pursuing mega built environment and infrastructure projects. He also loves cold water swimming, politics and good food.



**Alison Zalecki**

Since 2009, Alison has been helping companies to win more business. She has led successful deals from £50k - £1.2b across the public and private sector with an 80% success rate. As the Managing Director of Mozer, works with SMEs through to global brands in Professional Services, Real Estate, Development, Construction, Sports and Legal.



**Joe Riley**

Joe holds a Capture leadership role focused on the growth of ICF's Europe and Asia (E&A) operations. He previously led ICF's E&A bid teams in the UK, Belgium, India and China. With more than 10 years' experience, Joe has built and shaped work winning teams across a wide range of public sector markets. He has also managed client engagements with international clients such as the Rome-based UN agencies and the European Banking Authority.

Joe is APMP Professional certified and was recognised in APMP's 40 Under 40 class of 2020.



**Nora Navin**

Nora spent the first half of her 30-year career at tech companies and the latter in professional services at global law and consulting firms. She held various marketing/business development roles and rose to leading high performing pitch and proposal teams. Nora is currently an independent consultant in professional services and technology business development.



# BQ

BIDDING QUARTERLY

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