BQ

BIDDING QUARTERLY

ISSUE #15 | MARCH 2023

BID TECHNOLOGY:
STORIES OF TRIUMPH AND CHALLENGE

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Bid Solutions disclaimer: The content of several articles has NOT been edited as AI has been used.

FOREWORD

OLIVIA HARDY

ChatGPT had barely started making headlines outside tech and geek circles near the end of 2022 when Martin proposed BQ15's tech theme. Just three months later, it's hard to have any conversation around tech without mentioning ChatGPT, then AI, and inevitably, the future of work.

It's not like AI is new. It's just that most of us - me included - had not quite realised how close that future (which we had been eyeing wearily from a distance) actually is. This was despite me being closer than most to the tech industry in the bid profession.

We've been hearing about the possibilities and potential of AI for over a decade. But up until a year or two ago, we'd only seen a fraction of these go from ideation to practical application. An even smaller fraction trickled into the business software we use and rely on every day, with features that deliver tangible value. Some of these have been trivial, some very useful, and some have been called game changers.

Now though, with the emergence of ChatGPT and similar AI technologies in the mainstream, it feels like we're in the middle of a monumental shift. It is not unlike when the first iPhone came out, with its absent physical keyboard buttons and its apps for everything.

Nothing was ever the same for smartphones after that; more importantly, it changed the way we live and work. There's no going back. It feels like these new, incredibly smart and fast technologies have a similar potential to disrupt. Some say for the better and others say for the worse.

I thought it would be interesting to have ChatGPT perform a sentiment analysis on BQ15's articles. The result would give a sense of where the panel of contributors stands (in terms of their real-world experience with technology as bid professionals) and where they see all this going.

Of the 19 articles analysed, 53% are positive or mostly positive.

That's not very high when compared to the promises made by the makers of bid and proposal software. To be fair though, 36% of articles took a neutral position, and only 11% leaned towards more negative sentiments.

I then asked ChatGPT to extrapolate a bullet point list of all the common positive points, negative points, and recommendations from our various contributors.

The result was a total of 13 negative points, 21 positive points, and a whopping 35 different recommendations around various aspects of bid and proposal software. These ranged from best practices for content libraries, to bid and proposal software implementations, to selecting the right tools, to embracing technology. You can rest assured this edition of BQ is PACKED with good advice!

While I consider myself to be about 65% pragmatist and 35% enthusiast when it comes to technology in general, I wholeheartedly agree with those who stress technology is not a silver bullet that can magically solve all problems, particularly not people or process problems. Technology still needs people and process solutions which can then be enabled (or not) with technology. Otherwise, those problems will only be amplified and you'll end up doing more of the wrong things faster.

And as for the massive shifts we're seeing in AI, there are some legitimate concerns - but mostly a lot of cautious optimism. The future may be here but it is still early days. There are many more lessons to be learnt as software providers beta test new AI capabilities with real life professionals, and see if it performs as well in practice as envisioned in theory. Most agree humans are not likely to be replaced any time soon but will instead see a shiny new set of tools augmenting their toolbox.

It has been staggering to see the volume of existing software categories as we develop BQ Tech, the ultimate A-Z tech guide for bid and proposal professionals. It is a daunting task to catalogue the growing list of features and normalise feature descriptions. We don't want to standardise everything. We do want to make it easier to match capabilities to business requirements, figure out if a piece of technology is the right one to help implement best practices where they are needed most, and elevate your business to new heights.

We can't wait to put BQ Tech in your hands. Until then, BQ15 does a fantastic job of sharing relatable experiences, disseminating wisdom, and hopefully shaping the right conversations for those who are considering embarking on (or re-inventing) their journey into Bid and Proposal tech.

DARRELL IS A FREELANCE CONSULTANT SPECIALISING IN PROPOSAL AUTOMATION. HE BELIEVES TECHNOLOGY IS A TOOL AND IT'S HOW WE USE IT THAT REALLY MATTERS. DARRELL IS OUR NERD.

PIPPA DOESN'T LIKE THE THOUGHT OF MACHINES TELLING US WHAT TO WRITE - IT'S SCARY. WHAT HAPPENS TO ORIGINALITY, PERSONALITY AND EMOTION? SHE DOESN'T TRUST EMERGING TECHNOLOGY AND IS NOT RECEPTIVE TO IT. PIPPA IS, QUITE OBVIOUSLY, OUR LUDDITE!

DARRELL AND PIPPA LOVE SPARRING BUT WILL THEY FIND COMMON GROUND BY THE END OF THIS ARTICLE? LET'S SEE...

DARRELL WOODWARD

PIPPA BIRCH

THE NERD, THE LUDDITE, AND THE COMMON GROUND

WHAT 'TECHNOLOGY' ARE WE TALKING ABOUT?

Automation – systems that automate bid management, bid coordination and bid writing. Technology that removes the human element of what I have been doing quite successfully for over twenty years.

Except I would describe it as technology that removes the tedious drudgery and augments a human's talents, skills and experience. As bid professionals, we're heroes at winning work the hard way and we've developed some impressive superpowers. Now technology is offering us almost magical weapons to aid us in the battles to come. Our challenge and opportunity is to find a winning combination of human and tech.

You have such a way with words Darrell, you could almost convince me with that one paragraph. But I don't think of any of the bid process as 'tedious drudgery' – it's all part of persuasion.

WHAT'S WRONG WITH A SIMPLE EXCEL SPREADSHEET?

I love a spreadsheet. For most bids, an Excel spreadsheet bid plan is a beautiful thing – keeps things simple and easy to see. I don't need automation for that.

Absolutely nothing wrong with a good spreadsheet. They're simple, powerful, highly adaptable and easily shareable. For that matter, there's nothing wrong with a whiteboard for simple bid plans.

Provided no one comes along and wipes it off! Although I love spreadsheets, I admit I am currently looking into CRM as my business grows. I can imagine planning software for mega bids is useful when you involve multiple people. But do these automaters forget that we aren't all churning out 3,000 bids a day?

There's definitely a scale consideration. It's often larger organisations with the money to invest in new technology, the resources to operate and secure it, and are likely to see a bigger return on investment across a wider user base. That said, smaller bid teams can benefit too but the return on investment must be clear.

DO WE TRUST AUTOMATED COMPLIANCE CHECKS?

As a control freak (aren't we all?!), I don't trust it to be as thorough as me! How can a machine pick out the nuances of language and written instructions that we, as experienced professionals, can pick up?

I see it as a partnership rather than a competition. It's like using spell cheque. Can I trust it to find every spelling error in my writing? No, because it didn't correct "spell check"! But it regularly helps me pick out any mistakes I didn't spot myself.

Similarly, automating compliance requirements augments the experienced professional. Or perhaps it's the other way around? Together, the technology and the human collaborate by checking each other's work, automating time-consuming tasks and innovating new solutions.

It's a great timesaving thing for sure. And yes, useful for the teams that churn out hundreds of bids. But I like the old-fashioned approach – turn every page. And yes, I do use PDF on the screen and a virtual highlighter, so I guess I have succumbed to a certain amount of technology...

IS TECHNOLOGY ALWAYS THE ANSWER?

With so much technology available, we can sometimes feel pressure to use it simply because it exists. Not everyone needs or will benefit from the latest and greatest Next Big Thing. Choosing the right tool for the job is half the battle and we should consider the need for new technology carefully.

Yes, and to do that, we need to learn about what's available, and not just use it because it's the latest fancy gadget. People seem to like shiny things, but they don't all have staying power. All automated tools need management, which can often lead to them being decommissioned quite quickly.

> " AS A CONTROL FREAK (AREN'T WE ALL?!), I DON'T TRUST IT TO BE AS THOROUGH AS ME! HOW CAN A MACHINE PICK OUT THE NUANCES OF LANGUAGE AND WRITTEN INSTRUCTIONS THAT WE, AS EXPERIENCED PROFESSIONALS, CAN PICK UP?

WILL AI REPLACE BID WRITERS?

We were talking about ChatGPT on #ThursdayThrong the other day and about how it can literally write your LinkedIn posts and quality answers for you with just some basic details tapped in – now THAT'S scary!

Ah, this is everyone's biggest fear! Will robots steal my job?

I agree there's a laziness trap and I'm sure we'll see plenty of mindless, undirected, pure AI-generated writing in the near future. Despite the undoubted cleverness of tools like ChatGPT, the real winners will be those who use it to enhance their own writing and simplify some tasks.

I guess people already use Grammarly etc to help with spelling and grammar. I also use Word Editor to double check my work, as I have been known to make the odd mistake. No, really!

IS THERE A RISK OF PLAGIARISM?

In some fields this is definitely a concern. School homework is perhaps the most obvious but there are already AI models for identifying plagiarism and even models for identifying AI-generated content.

But surely using ChatGPT is plagiarism at its finest? Something has been written by 'someone' else and we are passing it off as our own?

Sure, but the entire bid freelancing and consulting industry is built on exactly the same concept. What's important is not who wrote it but whether it delivers clear, accurate and convincing information to help purchasers make good decisions. It's just another contributor, whose content we're editing, rewriting or discarding. Only difference is, it won't sulk when you do.

HOW WILL THIS TECHNOLOGY IMPACT OUR PROFESSION?

I think if there is a threat to the bid profession from technology, it will be driven by procurement. As they are challenged to be ever more objective, accountable and transparent in their decision making, they're turning to technology to remove bias and influence.

This is true. I've had to ask a CQ about whether the bid will be evaluated by machine or human. Because why write great persuasive text when all they are looking for are key words? If machines are setting and marking questions, you may as well get AI to write the response. And in that case, just go back to looking at price, because the words become irrelevant.

Yes, and that's why the procurement profession is moving away from transaction management with source-to-pay software integrating the end-to-end process of buying, monitoring and billing. Rather than replacing procurement jobs, they expect to free up more time for supplier relationship management and finding new streams of added value.

What happens when procurement are using AI to score bids and automate buying decisions? Logically, it wouldn't need a written proposal at all but would negotiate with supplier AIs in the language of ones and zeroes. Consequently, our evolving profession must elevate to meet the new needs of our procurement counterparts.

Well that's a lovely thought...time to diversify? I think not. People buy from people – we cannot let technology dictate this, we MUST keep the human element. I want to write with feeling, so my readers feel an emotional connection.

SHOULD WE USE CURRENT TECHNOLOGY E.G. MS365 TO ITS FULL POTENTIAL BEFORE INSTALLING NEW STUFF?

Most people probably won't even think of Microsoft Office as 'tech' because it's so normal in daily working lives. Yet, most users only use a tiny fraction of what Word and Excel can do. I once took a training course on Excel and the main thing I learned is how much I still don't know about it!

For those seeking some simple document automation, Word has surprisingly powerful built-in features. Field Codes, Quick Parts, Mail Merge and Macros can all be big time savers for proposals.

These are great features. I do love Word, but I'm not sure I've ever used it to its full potential. Automated features like Editor and Read Aloud do make my life much easier.

The recently announced Microsoft Teams Premium introduces AI-powered meetings. It will automatically take minutes, recommend actions and provide personalised highlights. It's a bot presenting to individual humans. For example, each participant receives what the AI thinks are the most important points.

Which actually sounds quite useful. This is so frustrating – I want to shout, "DOWN WITH TECHNOLOGY!", but then add "Not all of it, just the bits I don't like...".

SO CAN WE AGREE ON A CONCLUSION?

Technology and automation are transformational. They'll replace tasks not people. The combination of human ingenuity and machine efficiency will outperform either one alone. Technology has the potential to solve some of our biggest issues today: overwork, stress, and burnout. My advice is to choose the right tool for the job whether that's Post-It notes, a whiteboard, Excel, or a specialised software suite.

I agree. I must not get so emotional and recognise technology as the tool it is; an enabler and an enhancement to our human selves. We need an open mind. We must read and learn about technologies and benefits to make informed choices. BQ's technology edition will be invaluable when it is released! *Shameless plug for BQ*. On the flip side, we can't accept everything at face value because it is new and shiny.

Darrell and Pippa will keep debating. What they agree on is that change is constant and technology is evolving. Even if we don't use the tools, we must recognise what is available, how others use them, and how we can use them to our advantage - or we'll get left behind.

> **WITH SO MUCH TECHNOLOGY AVAILABLE, WE CAN SOMETIMES FEEL PRESSURE TO USE IT SIMPLY BECAUSE IT EXISTS. NOT EVERYONE NEEDS OR WILL BENEFIT FROM THE LATEST AND GREATEST NEXT BIG THING. CHOOSING THE RIGHT TOOL FOR THE JOB IS HALF THE BATTLE AND WE SHOULD CONSIDER THE NEED FOR NEW TECHNOLOGY CAREFULLY.**

AI IN PROPOSALS (BEYOND CHATGPT)

JAVIER ESCARTÍN

This article presents how AI-powered tools can help bidding from two perspectives – the professionals and the business leaders – and across three timelines: today, in three years, and in a decade.

SOME CONTEXT

First, a much-needed clarification: artificial intelligence is just software, a tool. The results look like magic because many never thought computers capable of performing this function. But if you look behind the magic, it's just software and maths.

So no entity is trying to take over the world. Good.

Second, AI is a large domain with one huge game changer for bidding and proposals: the AI Large Language Models (LLMs from now on).

WHY ARE AI LLMS SUCH A BIG DEAL?

At its core, bidding is about three fundamental things: analysing RFPs, managing bid preparation, and writing responses. With LLMs, computers are now able to do three fundamental things: understand*, parse (extract, convert, move), and write complex bodies of text.

LLMs' capabilities to support tender analysis (understand), manage proposals (parse), and draft responses (writing) allows you to unlock huge business value across the bidding process.

Let's not enter the ethical debate of what "understand" means; let's just accept LLMs can get the syntax and act on it coherently with language rules.

WHAT'S IN IT FOR THE PROFESSIONALS TODAY

User-friendly, generic LLMs can save us time in our day-to-day tasks. Examples include simplifying text, working with acronyms, extracting and organising text data, drafting outlines quickly, changing text styles, writing bios from resumes, and much more. These can save you massive time, and I personally recommend any peer to play with these and find their use cases.

There is one disclaimer: make sure you read and understand what happens with the information you prompt, no matter which LLMs you decide to use. As of today, March 2023, I don't know any generic LLMs where you can safely input confidential or proprietary information.

WHAT'S IN IT FOR BUSINESSES TODAY?

Generic LLMs won't cut it for your business, but niche solutions powered by this technology are already providing value to bidding teams.

Custom solutions powered by AI LLMs can give you a competitive edge by enhancing your processes for screening tenders, supporting bid/no-bid decisions (red flags, competitors' influence) and building proposal management assets from RFPs (e.g., automatic compliance matrices), getting response drafts quickly, etc.

Tech vendors are figuring out how to apply this technology effectively in bidding, considering all the intellectual property, confidentiality, and cybersecurity issues involved. There are a few that already have. If you would like more information about LLM use cases for both professionals and businesses, I've compiled data you can access for free by joining my newsletter. Please see my bio for details.

Now let's discuss some educated guesses about the future.

IN THE NEXT THREE YEARS

Given how expensive it is to build, train and serve these powerful AI LLMs, we may see only a few big ones run by the big tech names you are familiar with. There are some startups working with their own models, which has a point for some niche use cases (maybe even bidding). However, the inherent technical challenges in development may prevent this from being the norm.

It seems much more likely that, on top of these big powerful models, a middle layer of companies will unlock business opportunities by finetuning and developing tools serving specific markets and use cases. This means we'll likely have AI-powered tools specially designed and optimised to help us review RFPs and manage and write proposals – but it doesn't end here.

Since LLMs can be trained on specific bodies of knowledge – including your past proposals, sales reports, SMEs inputs, RFPs, and so on – we may see tech tools as specific as you can imagine. Tools trained to manage and write proposals in your market, industry, offering, or even for your usual client, fed from your corporate knowledge.

The results from these tools may make generic LLMs look like aficionado toys.

> "SINCE LLMS CAN BE TRAINED ON SPECIFIC BODIES OF KNOWLEDGE – INCLUDING YOUR PAST PROPOSALS, SALES REPORTS, SMES INPUTS, RFPS, AND SO ON – WE MAY SEE TECH TOOLS AS SPECIFIC AS YOU CAN IMAGINE. TOOLS TRAINED TO MANAGE AND WRITE PROPOSALS IN YOUR MARKET, INDUSTRY, OFFERING, OR EVEN FOR YOUR USUAL CLIENT, FED FROM YOUR CORPORATE KNOWLEDGE."

IN A DECADE

Let's be honest. This AI wave is moving so fast that nobody really knows where it will be in ten years – but here is my guess.

The same branch of AI is powering solutions on both sides of the RFP-Proposal process – buying and selling – so this technology could change procurement as we know it. It's not unfeasible to imagine new standards that will automatically specify and comply with requirements, or power procurement computers communicating with vendor's bidding servers to extract and process certain information.

In such a world, what makes you a good proposal professional or team would change drastically. Bidding could become a function where the actual bid preparation is all about having the right data, insights, tools, and making the right strategic decisions without much effort.

But decision making may be the last frontier. It involves much more than just technical capabilities and won't be just about tech and positive business cases.

IS THIS OUR KODAK MOMENT?

NIGEL DENNIS

Kodak was a company that dominated the world's camera and photographic film market for more than 100 years. It was one of the most powerful and well-known brands in the world, and at one stage had 80% of the global market share in the field of photography.* A 'Kodak moment' even became a generic term for a memory worth saving. The term was as much a part of our lexicon as 'Google it' and 'Zoom me' are today.

However, with the introduction of digital technology, everything changed for Kodak, including the positive association attached to a Kodak moment. Ironically, one of its employees invented the digital camera. But Kodak refused to embrace the technology, and even actively marketed against it. The mass market of digital cameras took hold and Kodak suffered a slow decline over many years until it was finally declared bankrupt in 2012.

WHAT KEEPS ME AWAKE AT NIGHT?

As a business owner in the bid consulting industry, the one thing that keeps me awake at night is wondering when our Kodak moment might come. I used to think our fate was in the hands of the procurement community. What if they decide they could, one day, source goods and services without the need for a competitive bidding process? My business, and maybe our industry, would then have one foot in the proverbial grave.

But lately I have felt more threatened by current technology than by these 'procurists'. The rise of automation and collaboration tools, online offerings, and open source chat forums are all potential risks to the very existence of my business and the livelihoods of those I employ. I've been feeling an unease I have never felt before. For the first time, I've felt somewhat like I imagine people may have during the Industrial Revolution of the 1800s and the Digital Revolution of late last century.

SHOULD WE BE WORRIED ABOUT TECHNOLOGY?

I decided to consult a learned colleague with considerable worldwide experience in technology and tendering. I asked them, 'Should I be worried about the threat of technology to the bid consulting industry?' Many of the readers of this magazine may know this colleague, so I will refer to them only with their initials, A.I. Here is their response...

'The bid consulting industry has been impacted by technology, but there is no need to be overly worried about its threat. Technology can bring numerous benefits to the industry, such as increased efficiency, better collaboration, and higher accuracy. By embracing technology and using it appropriately, bid consulting firms can stay competitive and adapt to changing market trends. Digital tools can automate repetitive tasks, allowing the business to focus on higher-value activities and provide a higher quality of service to clients. However, it is important to balance the use of technology with the need for personal connection and relationship building with clients. While digital platforms and tools can simplify the bid process, they cannot replace the importance of human interaction and complex thought. By maintaining a balance between the use of technology and personal touch with clients, bid consulting firms can differentiate themselves from competitors and provide a higher level of service.'

ISN'T IT MORE ABOUT CONTEXT THAN CONTENT?

Reflecting on the response of my colleague, I figured the ability to get content, and quickly, is a key area of this technology debate. But is content generation by itself a threat? Much of this technology draws on content that already exists. Computers can't really think new things, yet. They lack the critical thinking nuances of humans, to acknowledge empathy, or to realise a key moment of insight. Can they therefore communicate the most compelling solution to a buyer's problem?

I concluded the human brain's ability to bring context trumps plain content for the time being, at least in the world of competitive bidding we live in. That insight, plus the ability to interpret complex ideas, to be creative, and to imagine seems far more important to the world of winning than current technology. And until those attributes can be replicated by technology, let alone replaced by it, we still have a thriving industry with many opportunities.

LET'S EMBRACE THE OPPORTUNITIES!

So what can we learn from the Kodak case study? It was the *'ignorance of new technology and not adapting to the changing market dynamics'* that initiated Kodak's downfall.* Put more simply, it was how people reacted, or didn't react, rather than what technology did.

I again asked my learned colleague A.I. for their opinion. *'Technology will continue to advance even if humans do not actively accept it. However, embracing technology can bring numerous benefits, making it a valuable asset for the industry to leverage.'*

So let's welcome technology and all its threats and opportunities with gusto, and leverage it appropriately. Imagine how much better we can be with it, and the time we can save. That mindset seems a much better alternative to me than a slow decline to business bankruptcy and future anonymity. And with that I think I can once again sleep much more soundly at night.

*Reference: https://startuptalky.com/kodak-bankruptcy-case-study/

> **THE BID CONSULTING INDUSTRY HAS BEEN IMPACTED BY TECHNOLOGY, BUT THERE IS NO NEED TO BE OVERLY WORRIED ABOUT ITS THREAT. TECHNOLOGY CAN BRING NUMEROUS BENEFITS TO THE INDUSTRY, SUCH AS INCREASED EFFICIENCY, BETTER COLLABORATION, AND HIGHER ACCURACY. BY EMBRACING TECHNOLOGY AND USING IT APPROPRIATELY, BID CONSULTING FIRMS CAN STAY COMPETITIVE AND ADAPT TO CHANGING MARKET TRENDS.**

POOR PROPOSALS FASTER

JON WILLIAMS

Pre-written content's a particular passion of mine: I implemented my first proposal knowledge base back in 2000, and I've been learning how to do it well ever since!

Most organisations' content libraries merely enable them to write poor proposals faster. Here's my nine-step plan to managing content in a way that truly adds value.

I. FOCUS AND CLARITY ON WHAT'S STORED IN THE SYSTEM

Bring some science to the process. Don't dump everything into the library: we need to be more client-focused than that.

Review what is in the RFPs received from your customers. Group similar requirements together to generate a list of Frequently Asked Questions. And set some targets: "Great answers to these 120 questions will get us to first base on 65% of a typical RFP just by extracting the right content from the library."

It's not about having answers to everything. There is a tipping point of diminishing returns when comparing the effort to create and maintain a library with the effort to craft it afresh on live bids. But your RFP-driven data will show you that.

2. CONTENT OWNED AND DEVELOPED BY THE REAL EXPERTS

Being identified as an SME who owns content in your organisation's library should be a real badge of honour.

In our benchmarking research, more than 75% of the top performing proposal organisations have a library in which content is "owned" by the relevant subject matter experts: it's not "the bid team's" content. If you're the expert, it's your content. And the onus sits with you to make sure it's as good as it needs to be.

Our role, as bid and proposal people, comes in helping SMEs to display their messages persuasively and professionally in the proposal shop window – the content library.

3. TRULY EXCELLENT WRITING

BJ Lownie, who founded our company 36 years ago, uses a wonderful phrase: *"A great proposal is a joy to read."*

The pre-written content in your library's going to be re-used again and again (perhaps by salespeople who aren't naturally gifted writers). So that content has to be brilliantly articulated – perhaps the best there is. There are tests of great proposal writing:

- Customer-centric – does this resonate with the typical client's real hopes and mitigate their fears?
- Conversational, not stilted or overly formal
- "So what?" – always trying to tease out the benefits
- At every turn, answering "What do we do better?" than the competition
- "Prove it!", with evidence. After all, "You would say that, wouldn't you?" What do clients, end-customers, industry analysts, the trade press say about you?
- Speaking with one voice – aligned with agreed style guidelines, so the proposals drawing on the pre-written content library feel like a coherent story, not the random jottings of disparate enthusiasts in the business.

4. CREATIVE, HIGH-IMPACT DESIGN

"People see what it looks like before they read what it says." Yet I, for one, often fall into the trap of using the standard proposal phrase of "pre-written content".

When it comes to the re-usable content in your library, it's not just about the words! It needs to be brilliantly designed, with graphics that can be easily tailored.

5. ALL CONTENT PEER REVIEWED

When working on live proposals, it's good practice – which I hope you follow! – to let a fresh pair of eyes see a near-final draft of your content. A peer review – or, if you like your bid jargon, a "red team".

So it always amazes me when teams just drop content into their library without it first having been constructively challenged. Reviews are just as – even more – important for material that's going to be re-used so often. You need to hardwire a robust review process into your pre-written content development process, with all new material tested by relevant colleagues with fresh perspectives, to ensure it is as good as it can be.

6. A SKILLED, SENIOR CURATOR

Content doesn't develop itself. Content certainly doesn't manage itself. You need someone skilled to conduct the orchestra of SMEs here – and to keep them on their toes!

Experience suggests the most successful bid organisations have ring-fenced resources to manage their content libraries. Folks who won't get dragged off onto working on that deal with an urgent deadline, taking them away from keeping on top of the content – because live bids always take priority, right? Well they shouldn't!

Your content curator needs the right skills and experience in content management and bidding – along with great organisational savvy. It should be one of the most senior administrative roles in the proposal function.

7. ALWAYS UP-TO-DATE

It only takes one piece of content to be wrong for a salesperson to lose confidence in the system (and, therefore, in the expert who owns the answer).

It can only take one woefully weak answer to lose the deal. Or one outdated description of your capabilities to win you a deal you can't then deliver without considerable pain, risk or cost.

The moment you write a piece of content, it starts to drift out of date. Too often, there's a mindset of "Wait for the database admin to send out their annual review reminder", which can result in apologetic emails saying: "I'm sorry, that's been wrong for months. I'd better fix it." That's a sign of a broken system. You need to establish a culture where the content you own will always be up to date.

To quote my erstwhile colleague Andy Lynam, who (like me) has built and managed many of these libraries: *"Building a knowledge base isn't like creating a beautiful sculpture that, once crafted, can simply be admired forever. It's much more like creating a beautiful garden. It'll be perfect for just a day or two - then it'll start to deteriorate unless it's loved and looked after."*

8. A CLOSED LOOP FROM LIVE DEALS

At times, someone working on a live deal will find an opportunity to improve the content in the library or fill a gap where you don't currently have an answer.

You'll craft something better, or develop an interesting new flavour of the vanilla content in the library. After every bid, there'll be content for you to glean and clean.

You'll get client feedback flagging answers which can be improved to a higher competitive standard.

Everybody working on bids has a responsibility to feed back in whenever they see a chance to improve. It's not the bid team's library. It belongs collectively to everyone who uses it!

9. WRITTEN FOR MANY CLIENTS; READ BY ONE

And then, of course, it's about educating everyone using the library that cut and paste is the enemy when extracting content. You want this to make work quicker for them – but not too quick.

It has to be *"cut and paste and tailor"* – to this client, this opportunity. At the least, specific names, dates, locations. Their colours in the graphics? Mirror their language and question structure. Write a lead-in sentence that resonates with them by playing back their specific needs.

Implementing – and maintaining – a library of wonderful pre-written content is a fundamental enabler of proposal success. Doing so enables you to develop better proposals, quicker: to win more, and win more easily. We've been striving as a profession to find the best ways to do this since the first proposal content management software appeared on the market over 25 years ago.

How well do you do?!

> **BUILDING A KNOWLEDGE BASE ISN'T LIKE CREATING A BEAUTIFUL SCULPTURE THAT, ONCE CRAFTED, CAN SIMPLY BE ADMIRED FOREVER. IT'S MUCH MORE LIKE CREATING A BEAUTIFUL GARDEN. IT'LL BE PERFECT FOR JUST A DAY OR TWO - THEN IT'LL START TO DETERIORATE UNLESS IT'S LOVED AND LOOKED AFTER.**
>
> Andy Lynam

USING THE BASICS BRILLIANTLY

Picture this: you're checking out all of the fantastic bidding tech on offer, and you can't wait to drive efficiencies and improve your bids (and maybe make your life easier!).

But then… you find out you can't get approval, don't have the budget, or the business just doesn't have the appetite for it.

So many of us have been there!

I've worked within organisations over the years where we weren't able to invest in bid tech. If you're currently in this position, don't worry! Firstly, it doesn't mean you can't create winning proposals, build brilliant bid libraries or improve your bid lifecycle efficiency.

With this in mind, I have two questions for you:

1. What do you already have at your disposal?
2. Are you using all of its features?

IT'S TIME TO TALK BID TECH!

There are a number of different 'baseline' platforms and apps, but I'm going to stick to the most popular examples:

- **Email clients: Microsoft Outlook, Gmail or Hotmail**
- **Word processors: Microsoft Word or Google Docs**
- **Presentation programmes: Microsoft PowerPoint, Google Slides or Canva**
- **Spreadsheet software programmes: Microsoft Excel or Google Sheets**
- **Collaboration tools: Teams or Slack**
- **Web-based databases: SharePoint or Power BI**
- **Document hosting: SharePoint, Google Drive or shared folders**

WHERE CAN THESE FEED INTO YOUR BID LIFECYCLE?

BID TRACKING AND STORAGE

It's vital to have a clear process for storing client documents and submitted proposals. It's also best practice to have a clear way of knowing where an opportunity is in the bid process and a 'snapshot' of live progress at any moment in time.

What might you use?

- Use spreadsheets to log live and submitted bids – easily tracking progress and creating reports
- Create web-based databases for tracking live opportunities and their details
- Host client documents and submitted proposals within folders (maybe cloud-based) and remember to check access requirements and confidentiality
- Use online collaboration programmes for bid management and communication (particularly great for bringing together virtual teams!)

CHARLOTTE REES

> **THERE'S SO MUCH MORE TO SHARE ABOUT THESE BASIC PLATFORMS, AND I'D ENCOURAGE EVERYONE TO THINK ABOUT THE FUNCTIONS THAT ARE FLYING UNDER THE RADAR!**

BID/NO BID

It's important your bid qualification process works for you. This process can be delivered in many ways, e.g., through a conversation, a form or an automatic questionnaire.

What might you use?

- Create bid/no bid questionnaire templates in any word processor with tick boxes
- Utilise pre-built, in form functions in your email client
- Build weighted matrices through locked spreadsheets
- Use a web-based database to run workflows, host equations, weight answers and gain approvals

BID LIBRARY

When it comes to bid libraries, the most important thing is good content and a clear structure!

What might you use?

- Use any file storage with folders to host content, remembering to create clear categories and make navigation as easy as possible. Try not to hide content too deep into the folder structure
- Tag documents (where possible) for easy finding and searching
- Take advantage of user friendly home page layouts and pre-saved options for creating an easily searchable database
- Check out your options for workflows and alerts within your databases, considering review and expiry dates as well as SME content owner tags

CREATING AND MANAGING BIDS

Proposals and presentations are created in so many ways and fantastic looking documents can be created within standard programmes.

What might you use?

- Create bid plans in spreadsheets for project programmes and responsibility matrices
- Use any document software and create a number of baseline templates for consistency and efficiency (using style guides and pre-planned macro-based layouts will speed up your bid design and enable you to quickly tailor bid library content)
- Check out suggested design ideas on your documents (e.g., through Canva and Microsoft) to benefit from proven user-friendly layouts
- Consider how you can make navigation user-friendly within your documents, such as through hyperlinks, tables of contents and digital menus
- Use collaboration tools for storing your work-in-progress documents - cloud-based products usually allow for multi access, instant collaboration and version control
- Use free image websites such as Unsplash and Flaticon to create visually impactful documents
- Take a look at free visual discovery engines such as Pinterest for inspiration on your design layouts (we can all benefit from some creative ideas!)

REVIEW AND REHEARSE

Many of the basic packages come with some great tools to enhance your review process which are often unused.

What might you use?

- Use spelling and grammar review to proofread your documents. Try the 'Read Aloud' function to hear your content out loud - it's a great way to listen to your tone of voice and spot inconsistencies within writing
- Check out the readability options on any document to understand where you might be using complex language
- Benefit from presentation timers and direct rehearsal feedback from your presentation software

THIS REALLY IS JUST THE START!

There's so much more to share about these basic platforms, and I'd encourage everyone to think about the functions that are flying under the radar! Bid technology is fantastic and I definitely have noticed a difference in process efficiency (in particular) through great programmes and bid-specific applications. However, you do not need technology to be an amazing storyteller and win bids. Your clients won't know if you've used fancy technology or not.

So for anyone who hasn't got the opportunity to use some of the great programmes and options you read about in BQ Tech, don't be disheartened! Take this as an opportunity to think about ways you might be able use what you do have to its full capacity!

(P.S. YouTube has some fantastic videos on using your software in the best way! #NotSponsored)

IS TECHNOLOGY A SOLUTION LOOKING FOR A PROBLEM?

JON DARBY

I began my bidding career in the early nineties, when developing a bid normally involved a group of people working together under the direction of a Bid Manager to agree a strategy, design a solution, make up a price, and then write it all down according to the tender instructions. Fast forward to 2023 and this still sounds a familiar way of doing things, even with the advances in technology over the last 30 years.

> ❝❞
> **PEOPLE RARELY VENTURE OUT OF THEIR TECHNOLOGY COMFORT ZONES, ESPECIALLY WHEN THEY'RE UNDER PRESSURE.**

HOW DOES TECHNOLOGY PLAY A PART?

It seems as though the role of technology has thus far been as an enabler to take the heavy lifting off humans. But has it? Do people working on bids have more free time than before? Are they able to work on more bids? Produce better quality? More likely to meet deadlines? Only you will know the answers to these questions, but it can be argued technology has so far failed to deliver on all its promises.

If necessity is the mother of invention, why hasn't the use of technology progressed more? Many bid professionals still recognise a PowerPoint kick-off deck, an Excel bid plan, and Word proposal all saved in SharePoint and emailed using Outlook. I'm not criticising Microsoft 365; my point is people rarely venture out of their technology comfort zones, especially when they're under pressure.

PEOPLE AND TECHNOLOGY

Unless you're a one-stop bidding shop producing bids by yourself, you're going to rely on a team of people to contribute. That's where things get a bit tricky. You're at the mercy of time-poor people to give you high-scoring responses that align with your strategy, answer the question, influence the evaluator, and meet the word/page limits when you need them to.

Strategically important bids can hinge on one person delivering the goods on time. Bid Managers quickly learn the art of persuasion and diplomacy to extract information – any information, never mind whether it's well written and remotely related to the bid they're working on. So, can technology help them?

There are many software solutions aimed at the bidding market, but I wonder how effective they are in the hands of a subject matter expert (SME) at 1am. Could these specialist apps prevent them pulling an all-nighter in the first place? I've never known an SME who doesn't resort to their email/Word comfort zone in a time of crisis. I've met hundreds of deeply knowledgeable SMEs who can design complex IT solutions but can't use Word beyond making characters appear on the screen. Give them a specialist bidding tool? Forget it.

WHAT ISN'T WORKING?

Maybe we're looking at it the wrong way round? Instead of technology enabling people, what if technology just took over? Here comes AI.

AI might be as old as digital computing, but its time is very much of the moment. So let's indulge in a spot of '*Tomorrow's World*' for bidding.

Imagine a government ministerial department procuring highly regulated and nationally critical services. Contracts can be worth billions of pounds. If something goes wrong, the Prime Minister and the press hear about it. Procurements can last years, cost millions and still don't guarantee successful outcomes. Check out the National Audit Office if you need convincing. Awarding these contracts still comes down to two opposing teams of people reaching an agreement. But what if it didn't need to?

What if the department could use AI to constantly collect and analyse data in minute detail about how it functions financially and operationally – far more than the people who work there ever could? AI could forecast what's needed in the short, medium, and long term, and instantly procure those goods and services at the optimal time from vetted suppliers. Procurements would take a fraction of the time with minimal human intervention (perhaps as an approver with the final say as part of ethical governance).

AI would use a vast array of data to develop the specification. It would determine what the department needs and what the market can offer, both now and in the future. It would know what the department can afford, what makes a competitive price, formulate a contract, evaluate and model risk, and decide which suppliers to approach (with suppliers also vetted by AI).

The 'invitation to tender' and 'proposal' would be machine-to-machine interactions, where suppliers receiving 'invitations' use AI to respond instantaneously with a compliant solution that's modelled for risk and value over the contract term. Contracts could be signed instantly without protracted negotiations.

Now let's add quantum computing to the mix. It's hard to imagine where this will take society, but let's stay with bidding for now! Using the scenario above, if AI can specify a requirement, and respond with a proposal, the speed and depth of the evaluation using quantum computing is hard to comprehend (for me anyway). A massively complex ten-year service involving multiple suppliers could be modelled for every and any scenario in seconds. What will fail and when? Where will costs rise and fall? When will delays be incurred? How will risk and opportunities play out? Remember that AI and quantum computing are already a reality.

BACK IN THE ROOM

I was about to write that all this seems far-fetched, and maybe it is. But when His Majesty's government spends £1,058.2 billion every year, perhaps using technology underpinned by standards to derive better and more assured outcomes in less time is not such a bad idea after all.

I'm going to avoid saying this can't happen in case future generations mock me, but I do think we need to reimagine the art of the possible. And if you wish bidding was easier, be careful what you wish for.

CERI MESCALL

FROM PAPER TO PROMPTS:

THE EVOLUTION OF TECHNOLOGY IN BID DEVELOPMENT

" "
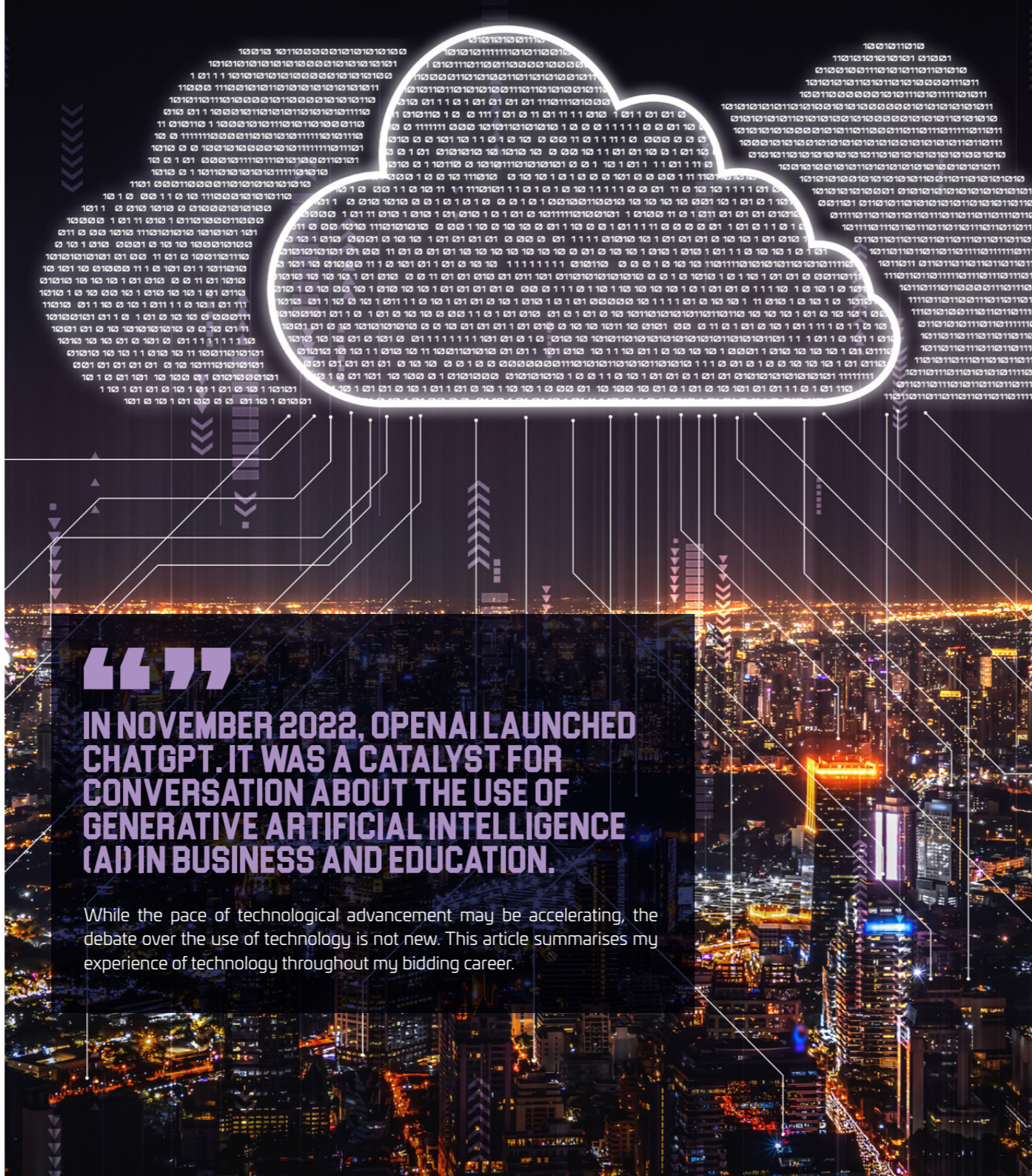
IN NOVEMBER 2022, OPENAI LAUNCHED CHATGPT. IT WAS A CATALYST FOR CONVERSATION ABOUT THE USE OF GENERATIVE ARTIFICIAL INTELLIGENCE (AI) IN BUSINESS AND EDUCATION.

While the pace of technological advancement may be accelerating, the debate over the use of technology is not new. This article summarises my experience of technology throughout my bidding career.

PAST

I began as a Bid Coordinator in 2006 when 95% of submissions were in hard copy. Production came with its own technology challenges. Before secure printing, our choices were: to ask everybody else in the office not to print until we'd finished; to stay in the office until the evening to print; or to hope for the best but then find another person's printing in the middle of the appendices (hopefully before we'd used the binding machine). I remember finalising a multi-million-pound bid with a Sales Director who then had to find a standing fan to cool the overheating printer. I would rather forget one client who mandated a handwritten response.

Then electronic submissions became more commonplace. We learned how to navigate client portal nuances such as accounts linked to specific IP addresses so we couldn't share logins; character/word count differences between portals and Microsoft Office; and the inevitable slowdowns on deadline days. Enhanced document design, interactivity, video, animation, and microsites followed.

The tech stack also progressed. We abandoned desktop PCs, desk phones and work mobile phones (usually Blackberry) in favour of laptops, tablets, and technology expense allowances. We upgraded temperamental, low capacity on-premises servers to cloud storage options. We advanced from relying on memory ("In which bid did we last answer that question?") to libraries of curated content with meta tags and the rise of the Knowledge Manager role.

We trialled chatbots for bid content assistance, but most were based on keyword searches and needed human intervention to answer more complex queries. Bid automation software became prevalent, but many organisations struggled with make vs. buy decisions, information security concerns, licensing cost structures, and user adoption challenges.

RECENT PAST TO PRESENT

The COVID-19 pandemic was an inflection point for remote working, and consequently, collaboration tools. The bid team I was working in served as a Microsoft Teams pilot group as part of an enterprise-wide rollout. We realised the benefits almost immediately - ease of use (more intuitive than SharePoint); reduced email traffic; improved version control; streamlined editing (no more merging multiple marked-up copies daily); increased accountability (assigning and prompting authors and reviewers in comments); and faster technical content generation (using the call record and transcription function for interviews with subject matter experts).

We also overcame challenges including resistance to change; complexities in consortium bids (toggling between different organisations' versions of Teams); and video call fatigue (acceptance of "camera on/camera off" preferences). Presentations shifted from onsite to virtual, so we invested in home office technology including ring lights and microphones. Videos submitted as part of bid responses were less corporate and polished, and more authentic.

Bid automation providers are using data analytics and user feedback to continuously improve their solutions. They've also repositioned themselves as thought leaders, sharing industry insights through whitepapers and webinars.

Last year I became self-employed. Most of my clients opt to ship me laptops due to information security and access concerns. However, many of my peers use their own hardware/software with client Virtual Private Network (VPN) connections.

FUTURE

In the article introduction, I mentioned ChatGPT as an example of generative AI. There are many others including Writesonic's ChatSonic and Jasper Chat, and the upcoming Google Bard and Microsoft Bing AI.

Arguments against using this type of technology for bids include fear of the unknown; perception of unfairness (using technology to cut corners); potential job losses; information security, privacy, and Intellectual Property (IP) rights; bias in training data and algorithms; accuracy and recency of information; and plagiarism. GPT Zero is a tool designed to analyse text to determine if / whether it has been generated by AI.

Reasons for using generative AI for bids include conducting comprehensive yet fast research; reducing the time to first draft; summarising information (e.g., turning a full CV into a brief bio); improving tone of voice consistency (particularly useful for consortium bids); simplifying the complex (editing technical content to improve reading ease); and accelerating the bid/no bid process (searching the RFP for "dealbreakers").

We may see new roles such as Prompt Engineers that combine the skillset of Bid Coordinators and Knowledge Managers. Bid Writers may refocus as Bid Editors. Bid Consultants will likely move from hourly/day rates to value-based pricing due to the time efficiencies.

And on the buyer side? They'll likely use AI to write RFPs and evaluate responses (at least as a first pass).

WHAT CAN YOU DO TO GET (AND STAY) AHEAD OF THE CURVE?

Realise how far we've already come. Continue the conversation - connect with colleagues to discuss relevant use cases. Explore free trials and training. Share your stories of triumph and challenge with the wider bid community.

GET THE BASICS RIGHT FIRST!

CHRIS KÄLIN

Since ChatGPT became available, everyone is talking about AI (Artificial Intelligence). The smart chatbot talks like a human super-expert on anything available on the internet. I have tested it myself, and it is truly mindboggling, scary, and fascinating all at the same time. A friend of mine even used ChatGPT to create a plan for his family's summer holidays. The result turned out to be far better than his travel agent's suggestions! Examples like this show us the enormous potential of AI. This is certainly why it triggers many bid centres to rethink their tools and tech strategy (or develop one).

So should we now focus on AI tools? No. While I truly believe AI will eventually and significantly impact the bid and proposal business, I suggest tackling this question from a completely different angle. Overall, we should start looking at using those tools and those pieces of technology that provide us with the most squid for your quid, right? From this point of view, we are distinguishing between three groups of tools and tech in the bid and proposal space.

THE BASIC STUFF

The first group contains those simple tools we all use anyway: Word, Excel, simple checklists, forms and templates, sample documents, prewritten text. The basics. We usually don't need to request additional funding to leverage these tools.

ADVANCED TOOLS

The second group is slightly more sophisticated. This group can include dedicated calculation tools, specific project management tools, software tools to manage CVs and case studies, and so forth. They typically require a certain degree of adaptation from the software supplier as they go beyond plug-and-play. They also require some investment but it is mostly a moderate amount of money, and the integration in your IT environment shouldn't take too long either.

COMPLEX, ALL-IN-ONE TOOLS

Then there are the more complex (and therefore often rather costly) tools. They are usually integrated 'all in one' tools that support you throughout the entire bidding process. Although potentially very powerful, they require a large degree of customisation to your process. Integrating them in our IT environment is a bit of an exercise. These tools require training and whenever something changes in your company's setup, they potentially need to be adapted. Depending on your setup, they can indeed bring a lot of value. But there is also the indisputable risk that the time and money you invest will outweigh the benefits of using them.

DO YOUR HOMEWORK FIRST

As you would expect, the low hanging fruits are in the first group. They must be priority number one! Are you using a user-friendly Word template? Are you using helpful checklists throughout the process? Have you got a basic set of prewritten text elements for typical sections of your proposals? Do you have a repository with the documents you will need again and again? Is your proposal storage well-structured and organised? You are getting it. Although very basic, reality shows that too many organisations still fail here.

Once you have done your homework with the first group, you can then think of going one step further. In most cases, it will be preferable to explore the second group and not to jump directly to the third group. Of course, some vendors will argue their software covers everything in groups two and three. They may also argue it is a waste of time to develop a multitude of tools first (groups one and two) before replacing them all with their all-in-one tool. And yes, they might be right – if you choose the right one and manage and populate it properly. The challenge for this type of software is that most bid processes are very cross-functional and interact with many IT systems across the organisation. The bid process itself is also far from standardised, so any software package needs to be extremely flexible and customisable to any bid and any organisation.

And one more thing: Don't get fooled by product demonstrations. They often make you believe these tools are super-easy to use to help you create stunning proposals within minutes. Too often your use case is different from the one shown, and you won't benefit from the tool in the same way. (Hey product vendors: please forgive me but you know it is true.)

Here is my conclusion: Do your homework first and get the basics right: templates, checklists, storage, etc.

In most cases, these will make your life much easier without investing a fortune. Once this is done (and yes, this is usually a bit more work than expected), you might want to look at group two – the dedicated, advanced tools. As an example, if you regularly need to provide multiple CVs/résumés and case studies to your clients, it might be beneficial to manage them with a dedicated tool to avoid regularly collecting, re-writing and formatting them.

If you believe you are ready for the third level, make sure you go through a thorough evaluation process. This should include reference visits and a pilot/proof-of-concept phase. Plan enough time and resources to do so. Then and only then will these tools truly boost your bid centre's efficiency.

But remember: A fool with a tool is still a fool!

> **SHOULD WE NOW FOCUS ON AI TOOLS? NO. WHILE I TRULY BELIEVE AI WILL EVENTUALLY AND SIGNIFICANTLY IMPACT THE BID AND PROPOSAL BUSINESS, I SUGGEST TACKLING THIS QUESTION FROM A COMPLETELY DIFFERENT ANGLE. OVERALL, WE SHOULD START LOOKING AT USING THOSE TOOLS AND THOSE PIECES OF TECHNOLOGY THAT PROVIDE US WITH THE MOST SQUID FOR YOUR QUID, RIGHT?**

TECH TRANSFORMATION

OR SHOULD THAT BE TECH AND TRANSFORMATION?

KATHRYN POTTER

Automation, AI, Content Libraries, Search Engines, Portals, Intranet, Word, InDesign... It's all technology and it all plays a part in the world of bids and proposals. The challenge is not what software or solution to buy or implement, it's actually knowing why you want it, what you want to achieve in implementing it and understanding the transformation activities you need to undertake to realise the benefits.

There is a pretty apt saying which I think applies to each step of the process: "Garbage in, garbage out" (or GIGO). If you don't know what you actually want to achieve by implementing a solution you will never realise what it can do for you. At the same time, implementing a solution isn't as simple as buying the software, speaking to the provider's project manager/salesperson, installing it and then telling everyone they need to use it or else.

> **" "**
> **IT'S NOT ABOUT THE TECH, IT'S ABOUT THE TRANSFORMATION THAT ACCOMPANIES IT.**

'Change Management' and 'Transformation' pop up the more people I speak to and the more I reflect on organisations I have worked with who have considered and/or implemented automation or other technology to streamline and enhance their bid processes. Taking those phrases further, it's clear that very often no one has asked HOW the solution/software will impact the way people work, and WHAT will be done to address this. This is a dangerous situation. If you don't address HOW it will affect people and a new way of working, you run a very real risk people will revert to their old ways.

I've seen organisations implement solutions because they wanted to be more efficient, have better looking proposals, save time, save headcount, increase win rates, and be able to find the information they knew they had. In each instance, the success of the solution wasn't related to how good it was but to how well the implementation was managed, specifically the transformation aspects of the project.

To realise the benefits of any solution – whether deciding to implement a centralised content library using SharePoint and the Intranet or a complete proposal automation solution that will interface with your sales CRM – you need to ask the following questions, and be really honest about the answers.

- WHAT do we want to achieve for our bid team by implementing XYZ solution? A centralised library? Total automation? Knowledge management? Better output in terms of proposal design? More wins? A smaller more efficient bid team? Greater collaboration? There are a whole variety of options here.

- WHICH solution (or combination of solutions) will give us the result we are looking for? It doesn't need to be just one product/tool.

- WILL the cost of the solution (annual subscriptions/licencing/bolt on options/implementation cost) actually give us tangible ROI based on WHAT we want to achieve for our team/organisation? What are the hidden costs, e.g., do we need to consider having a knowledge manager/administrator to keep it working optimally? What training is needed, what will that cost (in terms of work days lost and cost of training)?

- WHY is Solution A more appealing than Solution B? Cost is a factor but it shouldn't be the only one.

- And the most important question, which I truly think is largely forgotten - HOW will this impact the way we work?

As an analogy – my family like tasty bread for sandwiches and we go through a lot of bread. I did some research on hand baking vs bread maker. Ingredient costs are similar; labour isn't (man vs machine). I speak to a friend who swears by her bread maker, tells me how fantastic it is and how it's revolutionised school lunches. I'm sold - automation is the future. However, no one told me about the transformation I would need to make to my way of working to achieve this – that my family can go through a fresh-baked loaf a day, that clean-up is a nuisance if the mix is slightly out, the timer function isn't as great as I thought it would be, fresh flour is essential. I wasn't fully aware of the changes I'd need to make my behaviours, e.g., the way I shop and remembering to put the mix in on a timer before bedtime. So I have a tool that's fabulous and does the job but isn't providing what I want unless I implement some transformation activities.

It's essential to understand what you need to communicate across your team, whose buy-in you need (and no, it's not just the CFO and the head of bids), how it will impact the way you work, and what processes need to be adopted/adapted to make it deliver what you want.

Brainstorm with your team what you want to achieve, what the team actually needs to perform better and be more successful. Ask a lot of questions about what each solution can do and the work required from you (your team) to make it a success. Design a transformation programme to meet the requirements to make it work.

Understand whether your team are happy to move away from a spreadsheet/Kanban board to track response progress. Are they happy to have to click into a separate portal/tool that's not like Word to create the responses? How much library curation do you actually need to make the 'best answer match' option a real 'best answer match'? Does the export function deliver the finished product you thought it would? What will make them stop using the new solution?

It's not about the tech, it's about the transformation that accompanies it.

TECHNOLOGY IN BIDDING – LEVERAGING THE ART OF THE POSSIBLE

SAMANTHA BURNS

> **"WE STILL HAVE A LONG JOURNEY TO EMBARK ON – AND YOU'RE BETTER OFF GETTING ON-BOARD NOW, BEFORE YOU FIND YOURSELF WITHOUT A COMPETITIVE EDGE.**

Why is it that technology causes such a stir when we talk about it entering a new era or profession? What makes it unsettling, threatening or unnerving? One of the challenging things about writing an article on tech is the sheer pace it moves at. If we are to pause a moment and look at where we've come from – the inception point being a bouncing paperclip in a Word document (we miss you, Clippy), to a large language model that can draft answer plans for you (such as the much hyped chatbot, ChatGPT), you will see we still have a long journey to embark on – and you're better off getting on-board now, before you find yourself without a competitive edge.

WHY ARE WE SUDDENLY INTERESTED IN AI?

When we talk about tech in bidding, the elephant in the room is the dawn of artificial intelligence (AI). AI has been growing in popularity and usage over the last few years and we have seen a number of systems developed, including programs that can generate images, text, presentations and avatars. ChatGPT is the first program that has really resonated with the masses, and this is largely down to a marketing ploy by the developers – it was developed from human feedback to generate outputs that appeared to be, well, human. What makes this time interesting is how models are being trained. Previously, models were trained to be very specific, performing actions like recognising handwritten numbers – this is what algorithms such as spam filters look at. The recent wave of innovation can identify and fine tune a wide range of data, enabling it to tackle more specific problems. This opens the opportunity for bespoke models to be used for proposals.

For AI to enter the workplace and sit beside you as the co-worker you have always wanted, it has to be meaningful and add value.

WHAT CAN WE DO NOW?

Using some of the existing AI tools can help teams do more, faster. Below, I explore some of the shortcuts you can use but it is important to remember these tools haven't been specifically developed for bidding, so elements like strategy and decision making should be left to the professionals.

PLATFORM	FUNCTION	COMMAND
ChatGPT v.3.5	Simplify language	[insert text/paragraph] simplify this text
	List acronyms	[insert text/paragraph] list and define acronyms in this text
	Create bios	[insert CV text and define style/ word limit] create biography/ overview
	Draft answer plan	Create me a [performance management plan]
	Review compliance	[insert text] pull out requirements
Stable Diffusion / DALL-E / Midjourney	Generate a new image	Create an image of [a bridge being constructed]
Tome	Generate slide deck including graphics and content	Create me a slide deck on [HS2 phase 2a]
Jasper	Generate written content	Write me a short answer on [integrating carbon management]

This list is by no means exhaustive, but it demonstrates that by trialling different commands, you can bypass some of the initial and often messy idea generation phases in the bid process. In a nutshell, AI currently harnesses the ability to access an abundance of data and provide you with the best and most appropriate data set. What you do with this data is where the real value lies.

WHAT'S THE CATCH?

Going back to the original question, where does our hesitation come from? There are of course limitations to AI and risks to be aware of, as with any cloud-based system (or new colleague). Some risks include:

1. **Data sensitivity –** inputting sensitive data into cloud-based systems may pose a security risk. Therefore it is important to consult a cyber security professional if you intend on inputting sensitive data.

2. **Referencing –** not all programs will provide you with references, so if you're using a large language model for research, you will be better off using a program like Perplexity, which will link you to the various sites it has drawn from.

3. **Data accuracy –** it is true the response you get back may not be correct, as the data is only as good as the person who inputted it. Don't rely on AI to be right first (or even second) time.

4. **Net new answers –** AI can only pull from what it knows. If there is something truly innovative and ground-breaking, this will need human expertise to generate.

WHAT DOES IT MEAN FOR THE FUTURE?

If we are to assume we will adopt AI as a part of our every day, and use it to its full potential, what does that mean for the medium term?

It's not as sci-fi fantasy as you might think. The primary use for AI will remove the need for human CRUD (create, read, update, delete) data management, such as bid libraries, bid programming and comment control. It will aid in creating a compliant response and analysing documents quickly, which will ultimately allow for more time to be spent on strategy, positioning, and refining. It has the ability to level the playing field across competitors, which will put more focus on human factors, and potentially see a new wave of behavioural analysis emphasis and focus on individual capability and experience. After all, an AI tool will struggle to adapt a process based on situation - the bid manager's superpower.

AI will continue to be plugged in to everyday systems, such as Microsoft, and you will begin to see recommended text based on your individual algorithms.

Ultimately, technology is there to support us, and give back time – harnessed correctly, tools will support in more collaborative, intuitive and intelligent bidding. As Matt Mullenweg so neatly put it, *"Technology is best when it brings people together."*
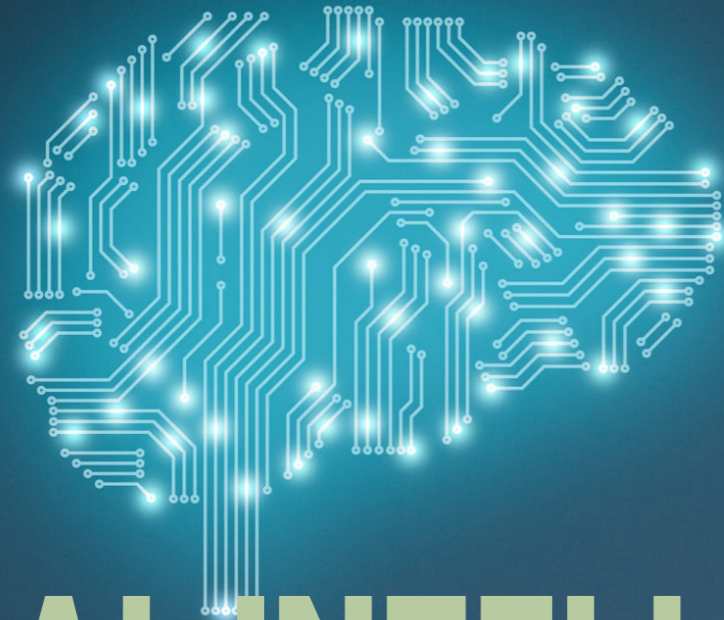
> **ULTIMATELY, THE BEST APPROACH MAY BE TO STRIKE A BALANCE BETWEEN USING AI AS A TOOL TO AUGMENT YOUR CAPABILITIES, RATHER THAN REPLACING THEM ENTIRELY.**

MICHAEL BROWN

ARTIFICIAL INTELLIGENCE IN PROPOSALS - THE DEBATE

As proposal writers and people involved in bidding, we are aware of the challenges and demands of this important job. Artificial intelligence (AI) has the potential to transform many aspects of business and industry, including the proposal process. While some see AI as a powerful tool that can streamline and improve the proposal process, others are more sceptical or even opposed to its use. In this discussion, we will consider the various perspectives on the use of AI in proposals, including the potential benefits and drawbacks from the perspective of proposal writers.

THE ENTHUSIAST

AI has the potential to revolutionize the proposal process by streamlining and automating many time-consuming tasks. For example, AI could be used to analyse historical data on successful and unsuccessful proposals to identify patterns and trends, which could help you tailor your proposals to better meet the needs and preferences of potential clients. AI could also be used to automate tasks such as data entry, formatting, and proofreading, freeing up time for you to focus on more high-level tasks such as research, strategy, and writing.

THE SCEPTIC

While AI may be able to handle some tasks more efficiently than humans, it lacks the creativity and nuance of human thought. There is also the risk that AI algorithms could be biased or make mistakes, which could harm the credibility of your proposals. For example, an AI algorithm might analyse a proposal and recommend cutting certain sections that it deems unnecessary, but those sections might contain valuable information or persuasive arguments that a human would have recognized as important. Additionally, if the AI algorithm was trained on biased data, it could perpetuate and amplify those biases in its recommendations.

THE PRAGMATIST

AI has the potential to be a useful tool in the proposal process, but we need to be careful not to rely on it too heavily. As proposal writers, you should use AI to augment your capabilities, rather than replacing them. For example, AI could be used to analyse large amounts of data and generate insights that you might not have been able to discover on your own, but it's important to review and interpret those insights before including them in a proposal. AI could also be used to automate mundane tasks such as formatting and data entry, allowing you to focus on more strategic tasks such as research, strategy, and writing.

THE LUDDITE

AI is a threat to human jobs and will ultimately lead to the demise of civilization as we know it. As proposal writers, you should avoid using AI and instead rely on tried-and-true human methods. For example, if you rely too heavily on AI to generate proposals, you risk losing the personal touch and human connection that can be important in the proposal process. Additionally, if you rely on AI to handle all the tasks involved in generating proposals, you risk losing valuable skills and knowledge in those areas. It's important to preserve the role of humans in the proposal process to ensure that we maintain our skills and expertise.

In conclusion, the use of AI in the proposal process is a complex and controversial topic, with proponents and opponents alike making valid points. On the one hand, AI has the potential to streamline and automate many tasks, freeing up time and resources for you to focus on more strategic and creative work. On the other hand, there are concerns about AI's ability to fully replicate the creativity and nuance of human thought, as well as the risk of biases and mistakes. Ultimately, the best approach may be to strike a balance between using AI as a tool to augment your capabilities, rather than replacing them entirely. As proposal writers, it's important to carefully consider the pros and cons of using AI and make an informed decision about how to incorporate it into your work.

Note: The above article was written with the help of Artificial Intelligence (Open AI)!

GETTING FROM A(I) TO B(I)

BELLA STEVENSON

Full confessional disclosure – Artificial Intelligence (AI) is not something I have dwelled upon in my career as a bid professional. AI is something I have always associated with robotics in a high security lab somewhere, not a tool that could be used to enhance and streamline bidding work.

Recently, there has been a lot of press coverage about the use of ChatGPT (Chat Generative Pre-trained Transformer), an AI powered chatbot designed to respond to questions in a text format and sound convincingly like a human. ChatGPT utilises information from the internet to respond accordingly, including appropriate follow-up questions.

> **" " THE TWO ELEMENTS COMBINED – ARTIFICIAL SYSTEMS AND HUMAN KNOWLEDGE – CAN REALLY HELP ORGANISATIONS TO USE AI ACCORDINGLY AND TURN IT INTO BI – BIDDING INTELLIGENCE.**
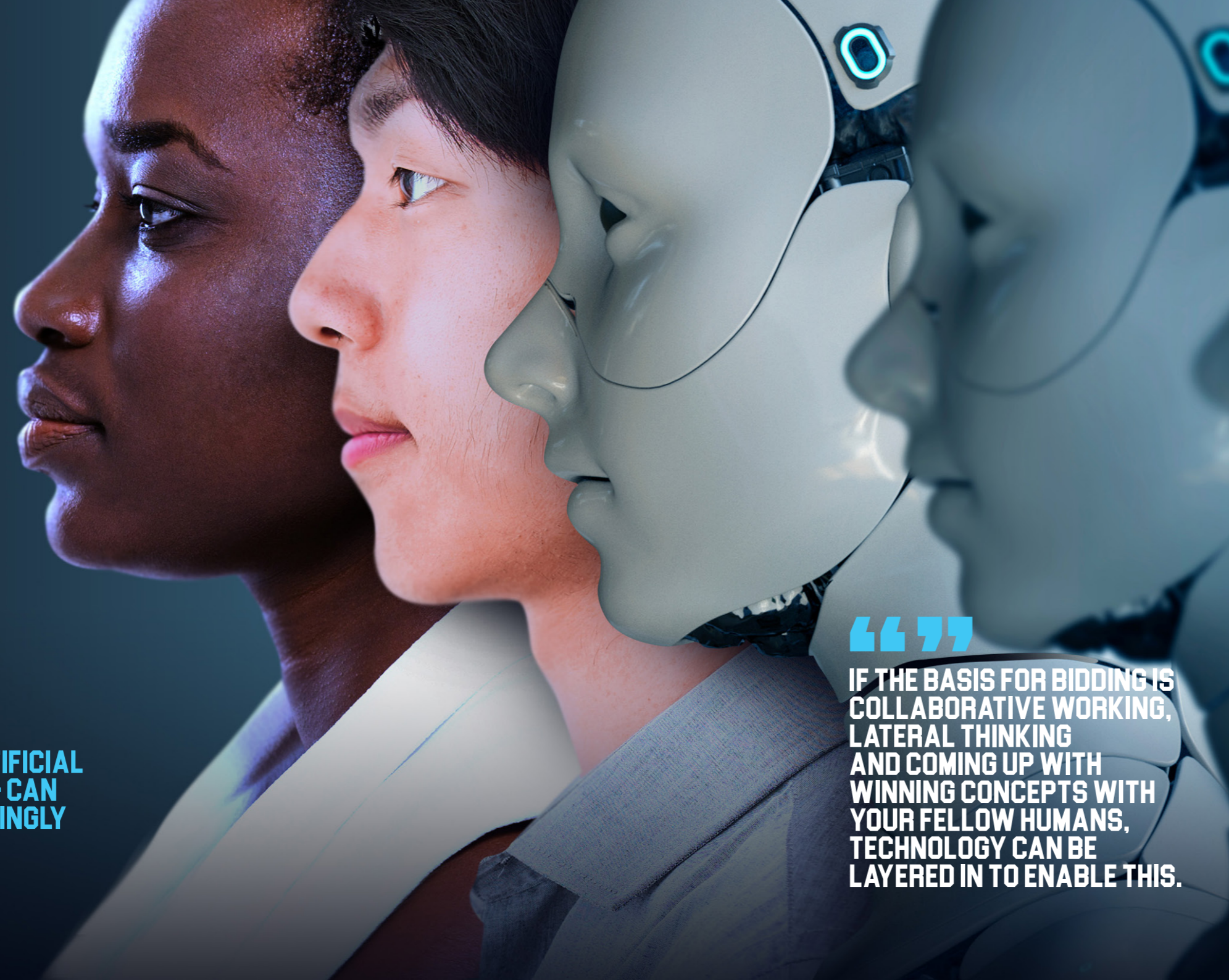
Some of the biggest concerns around this technology has been the use of it within educational institutions and students using it to complete assignments. This has got me thinking about its use in the bidding profession and its potential impacts – both positive and negative.

The technology could have a positive impact at the very early stages of the bid process of capture management, where you are gathering insight and building a win strategy based on what you have discovered about a potential client.

ChatGPT could be used to obtain useful research, such as competitor analysis, to feed into the capture management plan. However, even ChatGPT could have its limitations here by not accounting for important pre-tender engagement with the client to really understand their key procurement drivers and project objectives.

My biggest concerns with using AI as standard practice within bidding is that lateral thinking and collaborative working, which really underpins a great tender submission, could be replaced with something much more utilitarian and lacklustre.

One of the main joys of being involved with bids is the continual interaction with your internal subject matter experts (SMEs). This meaningful engagement through storyboarding sessions, workshops and focussed review meetings really draws out the innovation and original ideas to help ensure the bid is of highest possible quality.

Indeed, if there was an increase in the use of AI to respond to the tender questions, would buying authorities start to see very repetitive tender submissions from all suppliers?

With no distinguishable features between suppliers during the tender process, buyers may find it difficult to gauge which supplier is best placed to service their contract in the long term.

External AI may still be in its infancy in the bidding sector but there are many other 'tech tools' available, particularly to assist content management for bid submissions. Systems

> **" " IF THE BASIS FOR BIDDING IS COLLABORATIVE WORKING, LATERAL THINKING AND COMING UP WITH WINNING CONCEPTS WITH YOUR FELLOW HUMANS, TECHNOLOGY CAN BE LAYERED IN TO ENABLE THIS.**

such as EasyPQQ, a cloud-based bid management system with an internal AI search engine, has been (mostly) beneficial when used in past roles.

The main feature I enjoyed was having access to previous responses/content to build the new bid's response. From memory, though, this needed to be handled with caution: running word searches to find relevant information would often bring up too many search results.

Anecdotally, on occasion it may have been quicker to write a bid response from scratch than search on the system for the information you needed, due to the nature of the key word search function.

The overarching issue with such software is ensuring there is sufficient human resource to manage and input the correct information. It is important to avoid a RIRO (Rubbish in, rubbish out) system that communicates out of date information in your bids.

However, specific bidding tech with an internal AI search function (managed properly) could be highly beneficial for emphasising the importance of the bid process when working with internal SMEs. This collaborative tool can encourage their input into tricky technical questions (providing the time and space to do so) and bring great benefits to an organisation.

If the basis for bidding is collaborative working, lateral thinking and coming up with winning concepts with your fellow humans, technology can be layered in to enable this. I do believe these tools should be used with care, consideration and at a pace which still allows extensive human interaction and knowledge sharing to devise the direction and agreed content of a bid.

The two elements combined – artificial systems and human knowledge - can really help organisations to use AI accordingly and turn it into BI – Bidding Intelligence.

RITA MASCIA

THE ONLY QUESTION TO ASK IS WHICH?

I first encountered bidding technology in 2012. I was so impressed!

I wouldn't consider myself an early adopter of technology but I am certainly one who enthusiastically embraces it when I see its value. However, after the initial delight of the novelty came the realisation that bidding technology was only as good as the work I put into getting everyone to use it.

> " "
> **IT SHOULD ONLY BE A MATTER OF WHICH SOFTWARE TO CHOOSE, PROVIDED YOU GO IN WITH YOUR EYES WIDE OPEN.**

Bid software allows you to do many things quickly. It makes nudging your SMEs for their contributions easy and gives you an overview of who has done what, without the need to maintain a separate accountability matrix. It saves time and gives visibility into the current status of the bid management process. You can also see which pieces of content have been used the most, which teams respond the fastest, and so on. If you work with partners, they can also use the software and the security of your bid library of reusable content is preserved.

WHAT'S NOT TO LIKE, RIGHT? I WISH IT WERE THAT SIMPLE.

In my previous life as a bid management consultant, I was tasked with implementing the adoption of a well-known software platform within my customer's organisation (an NHS Trust). I coordinated induction and training for all the subject matter experts and the bid team and actively managed the process.

Having successfully implemented the technology to a large number of users (and being a user myself), here are my top tips:

1. **Start with an audit of your current tools** and see how else they can be used. Are you sure you really need a fancy software programme? As Chris Kälin suggests in his Bid Master programme, bid management functions should have a set of basic simple tools, specific tools, and super tools. But we should all start with the basic simple tools first before we invest time and resources in more sophisticated toys.

2. **Know what you are trying to achieve** and write the specifications as if you were issuing a bid (because you will be doing that eventually!). I didn't have to do that because my client had already purchased the software. But if you are the one deciding which programme to choose, your budget will determine the scope. Decide what key benefits you are seeking and prioritise them. The needs of an enterprise are different from those of a small or medium business. The geographical spread of your team and customers will also have an influence on the choice of software and whether you need to give secure access to partners or whether multilingual functionality is required.

3. **Involve your IT department BEFORE you do anything else. Trust me, without its blessing, there is a lot that can go wrong. Also, if IT is happy with the safety and integration aspects of the bidding technology, they are more likely to support your business case.**

4. **Have a sponsor who will support you to get resources to train your team.** You will be amazed at how time consuming it is to set up new users or re-train those existing users who only use it sporadically. It will become your full time job otherwise.

5. **Have a team, not an individual, to implement the system.** If the individual leaves, or gets promoted, or changes department, there will be no one to drive the implementation.

6. **Do not link the implementation of the system to some other IT project like CRM etc.** Chances are the deployment will take longer. Instead, look for an off-the-shelf solution that you can use from day one but that allows you to integrate new elements later.

7. **How are you going to justify the continuous budget required for using bid collaboration software?** Start as you intend to continue by choosing a platform that also captures data showing the benefits to the company. Do a presentation for your peers in other functions to see if they could find the technology useful in their work. Sharing the costs with other departments will secure funding for years to come.

It's impossible to do this topic justice. Yes, I am in the 'pro' camp of bid professionals who think this wonderful technology enables us to maintain efficient and current bid management content and can help us to produce great looking, compliant, and persuasive proposals!

For me, the biggest draw is the reporting and analytics function. I am particularly interested in the development of more sophisticated tools to track which part of a proposal the buying organisations are opening, reading etc. If that possibility is not pure gold for a bid professional, I don't know what is.

Returning to my original question in the title, it should only be a matter of which software to choose, provided you go in with your eyes wide open. It may be a long journey full of potential pitfalls but if you have done your homework, you should be able to avoid all those dangers and select the right platform for your needs. **Enjoy the ride.**

GOING DOWN THE RABBIT HOLE

LARISSA CORNELIUS

"EVERY ADVENTURE REQUIRES A FIRST STEP."

Lewis Carroll, *Alice in Wonderland*

The world of proposals is changing, and the proposal profession is being forced to adapt. AI (artificial intelligence) is already having a huge impact. It's affecting the way people write and communicate, which in turn affects how proposals are written.

AI is all around us. No matter how much it scares us, we need to understand what it is, how it works, and its potential impact on our industry and our job security. This article will explore how AI is changing the proposal profession and what it means for you as a professional in this industry.

The advancement of technology is amazing and frightening. I have always considered myself a quick learner, but I need help to keep up. Luckily, this is where AI steps in. I wrote the following questions. The answers were generated by Copy.ai.

What is AI?

AI stands for artificial intelligence, which means that it uses computers to mimic the thinking of humans. AI can help businesses, from large corporations to small start-ups, by automating specific tasks and processes. For example, smart machines can help make proposals more efficient.

How will AI change the proposal profession?

AI will impact the proposal profession in many ways and knowing how this technology can help you succeed is important.

AI has already made its mark on the proposal industry in several ways.

To begin with, there's been a shift away from human-generated proposals toward machine-generated ones - and this trend will only continue as AI becomes more sophisticated. Using bots will make it easier for companies to create compelling proposals at scale and lower costs as they do so.

In addition, AI allows organisations to make better use of their data. For example, suppose you're looking for information about your competitors' marketing campaigns or customer service teams. In that case, you can ask an AI bot to find it for you instead of spending hours combing through spreadsheets or web pages. And this data can be used in all sorts of ways: to identify opportunities for improving current processes; create new products and services; execute those ideas; and much more!

Finally, AI will help improve collaboration among teams working on proposals, which means faster turnaround times and better results overall.

However, there are also challenges associated with using AI in business processes like proposals.

What are the pitfalls of AI in the proposal profession?

The short answer is: it depends.

AI isn't a panacea, and it's not a cure-all. But it can be an incredibly powerful tool in the hands of a skilled professional. But there are some downsides to using AI for proposals, and businesses need to know what they are before they jump into this new technology.

For instance, there's no getting around the fact that AI is still relatively new. While many applications have been developed for AI use, none have been around very long. This means there's no telling how long they'll last or what might happen if you switch platforms or providers later down the road (and trust me: you will).

Another thing to consider is that while AI can help you with many aspects of your proposal process—from gathering data and information to writing content—it doesn't know everything yet. Some experts say it may never be able to do so because there are so many ways people think about things and interact with them every day. So, while it might seem like an easy way out at first glance, don't be surprised if you need human intervention

What are the current top five AI tools on the market?

1. **The Watson system** is a natural-language processing tool that can analyse data and make predictions.

2. **The Microsoft Bot Framework, which** can perform tasks like scheduling meetings and sending emails.

3. **The Salesforce Einstein Platform can help** salespeople make better decisions about customer needs and wants by analysing data from social media posts and other sources.

4. **The Google Duplex system** can conduct phone calls with humanlike responses based on artificial intelligence (AI) technology and machine learning algorithms that enable it to understand what's being said in a conversation.

5. **The Amazon Alexa voice assistant** helps users control connected devices using voice commands instead of touch screens, keyboards, or buttons on a smartphone or tablet device.

If you want to know more from Copy.ai, I suggest you log onto an AI tool and "go down the rabbit hole".

The human perspective (or is it?)

"I can't go back to yesterday because I was a different person then."

Lewis Carroll, *Alice in Wonderland*

Here is my personal perspective on how AI will change the game: it's going to make you obsolete! Wait…did I say that out loud? But seriously: AI is already making it easier for people to create better proposals faster than ever. So if you're not using AI in your business, you are missing some serious competitive advantages and probably losing money too!

Our team already uses:

- **Microsoft Teams (and various other apps) that annotate minutes, teach you to communicate better, schedule and collaborate**
- **Canva for design (which now has AI built-in)**
- **Loopio for proposal automation**
- **Copy.ai for content ideation**
- **Visible Thread for better readability, compliance checks, instant compliance matrices, and document comparisons**

In this new world of proposal writing automation, we need to consider using AI tools to handle all the heavy lifting (with human help) while focusing on what matters: strategic thinking and client relationship building. There is a Wonderland of tools out there. We now need to figure out how best to make them work for us.

PROCURING TECHNOLOGY IS A TEAM EFFORT

BETH WALLACE

Isn't it fascinating how technology has changed over the years? From those big, cumbersome IBM machines (that originally didn't even fit into a NASA room, as dramatised in the film *Hidden Figures*) to each of us walking around with a computer multiple times more powerful in our pocket or bag, disguised as a smartphone.

Technology in the workplace can be such an enabler. Think even on a micro scale of your working life: our predecessors using abacuses, the wonderful Casio calculators of my youth and how you can now quickly create formulae in Microsoft Excel to efficiently give a mathematical answer. But it can also be very complicated and (if you don't buy technology of any sort regularly) daunting to think about how to get the best use of what is often a large investment in both time and money.

I have bought or supported the purchase of many digital solutions over the years for a variety of businesses and seen the highs and lows of these projects. I would like to share some pointers if you are thinking of using technology to enhance your bid team's functionality – especially if you are not a regular technology buyer.

> **" RELATIONSHIPS WITH SUPPLIERS OFTEN FAIL DUE TO LACK OF EXPECTATIONS BEING MET AND/OR LACK OF DOCUMENTED AND FOLLOWED GOVERNANCE BETWEEN THE SUPPLIER AND THE CLIENT.**

First: if your business is big enough to have a technology team, give them a call. Why? Let's explore how they can help you:

- **Technology projects can be complicated and unforeseen time and money can add up quite quickly. Your tech colleagues can explain how your potential system or tool might link to the company's existing technology infrastructure and also what your company may have planned in the tech space for the future. There might even be an existing solution that can be tailored to meet your needs, avoiding double sourcing or wasted time and effort.**

- **They will be a great source of information. They will help you explore the scope of support requirements, who will own the technology solution and who will provide front line support if something goes wrong (e.g., the technology is installed but not working). Key questions/considerations include:**

  - **What service level do you need from the system?**

  - **Will your IT department or the supplier provide support?**

  - **How will you contact them?**

  - **What is acceptable for "downtime" and "fix time" when you won't have full or partial access (i.e., do you have time in the midst of a pitch to wait a couple of days whilst they sort it all out)?**

  - **Who is going to administer the solution for you (i.e., not just keep the product itself up to date but also the information held in it and how you can access it in a consistent and easy way)?**

- **They may also help you review the service or terms you will have to accept if you buy a standard product or determine how much of your own team's time will be needed to customise the solution for best results.**

Second: if you have a procurement team, engage them as well. A good procurement colleague can help you write the detailed specification for both the initial buy and the ongoing governance. They can also help you determine the best commercial model (i.e., how you will pay for this), identify market suppliers and ensure you know how to objectively and simply write criteria to select the right supplier for you and your company. They may even be your critical friend to challenge some of your thinking as you build up your requirements.

> **" IF YOU HAVE A PROCUREMENT TEAM, ENGAGE THEM AS WELL. A GOOD PROCUREMENT COLLEAGUE CAN HELP YOU WRITE THE DETAILED SPECIFICATION FOR BOTH THE INITIAL BUY AND THE ONGOING GOVERNANCE.**

There are many other colleagues (e.g., data protection, legal, information security, etc) who should be involved in this type of project. If your company does not include these roles, you should consider bringing in external expertise (even temporarily) to ensure your choice is fit for purpose.

In any case, make sure you write out the specification in clear, simple language without too much technical jargon. Think long and hard about the skills your team will need to use this product, and whether they will be capable straight away or will require training from the supplier to help them implement and manage the service. Be sure to write these requirements into your specification.

In my experience, relationships with suppliers often fail due to lack of expectations being met and/or lack of documented and followed governance between the supplier and the client. Spending the time and energy upfront to define what you want and to be clear on accountabilities and responsibilities (not just with the supplier but also internally within your company) goes a long way to mitigate some of that risk. I wish you luck with your project!

HARVESTING DATA SCIENCE TO QUANTIFY BENEFITS

PETER McPARTLAND

Win theme statements are the cornerstones of our proposals. They simplify the review experience for the reader and are vital as lifestyles make it more difficult than ever before to hold a reader's attention. However, these highlights can often descend to simply being vague benefit statements linked to generic priorities. They are simply advantages – when what we are aiming for are well-substantiated discriminators that elevate confidence in your proposition across the requirements the client has acknowledged as important.

The challenge with discriminators isn't in relating what we present as USPs to known priorities. The challenge comes in their substantiation with clear evidence. Customers buy benefits, not features, but too often we can be guilty of failing to logically illustrate any confidence in our ability to deliver the benefit through clear, data driven information.

HARVESTING DATA DRIVEN EVIDENCE

Leveraging the depth of insight by Data Science and Advanced Analytics teams holds the key to quantifying benefits and also offering unthought-of perspectives for further investigation.

Increasingly, data science experts within our businesses hold the key to turning the bid teams' traditional approach to generating win themes on its head. Data scientists are quickly becoming catalysts within a business for uncovering new patterns, trends, correlations, and relationships to reveal the true impact specific elements of our solutions are having. From this they can further explore ways in which to harvest impressive data driven evidence to stop the reader in their tracks.

Data science technologies speed up an analyst's ability to combine and scrutinise large datasets from various sources to perform pattern recognition and predictive modelling.

With predictive analytics, data virtualisation and data visualisation tools at their fingertips, exploring huge datasets linked to performance and outcomes can now be the starting point for aligning our areas of excellence to client priorities.

This expert analysis often throws up insights that can energise the development of the bid and offer new specific areas of focus. These feed perfectly into the development of visualisations such as infographics, charts, graphs and consistent imagery which are lightyears away from shallow advantage statements.

The benefits of data scientists and their technologies doesn't stop there for bidders.

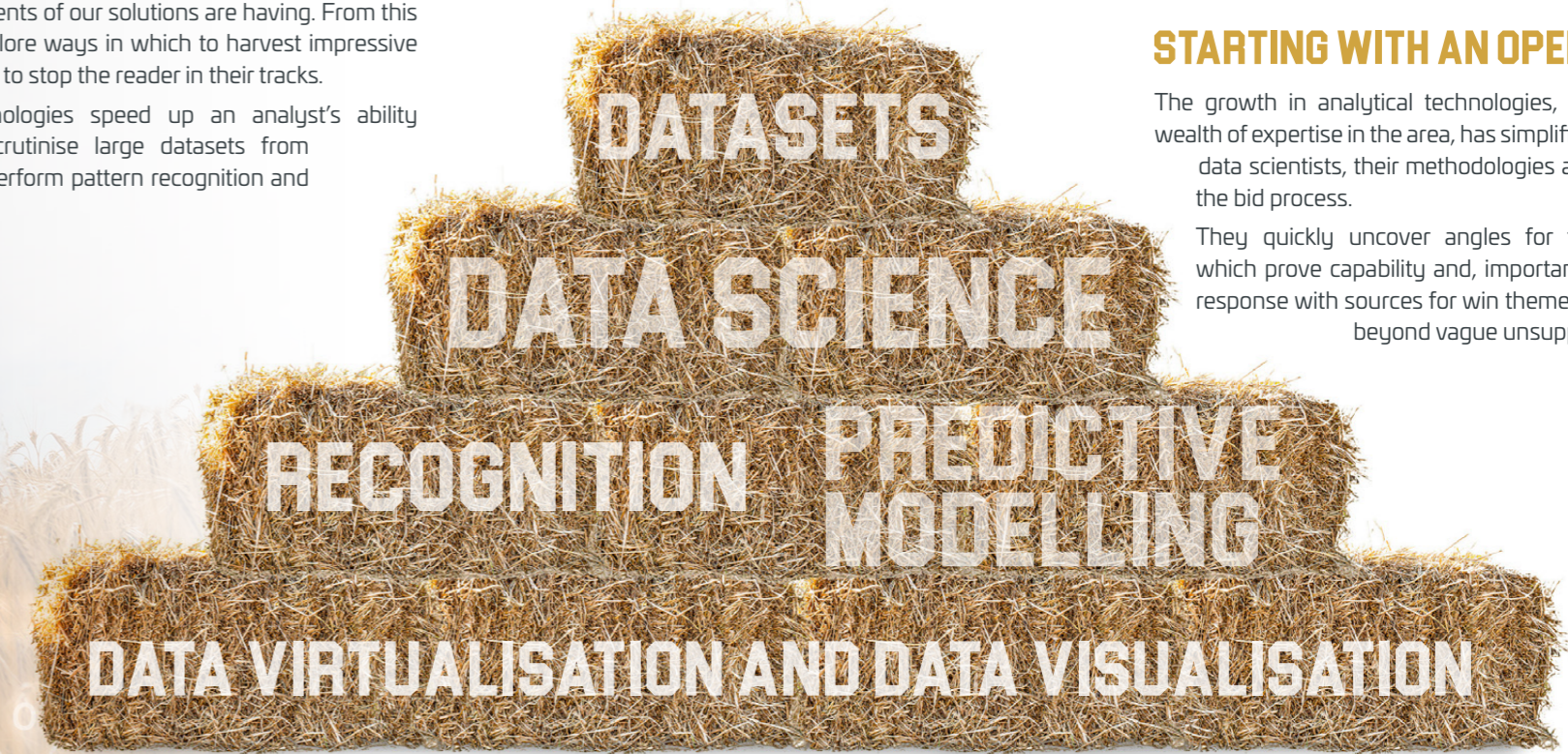## MODELLING THROUGH CUSTOMER SPECIFIC PREDICTIVE ANALYTICS

For many of us, the documents provided by prospective clients include historical data which can be analysed using predictive models. This extends your discriminator to support and strengthen an evaluator's business case.

Predictive modelling can also be applied where you are the incumbent. It can demonstrate how patterns and trends will play out against a series of scenarios to generate even greater future commercial impact for our clients.

STARTING WITH AN OPEN MIND

The growth in analytical technologies, underpinned by the wealth of expertise in the area, has simplified the ability to bring data scientists, their methodologies and technologies into the bid process.

They quickly uncover angles for further investigation which prove capability and, importantly, energise the bid response with sources for win theme content that go way beyond vague unsupported promises.

DATASETS

DATA SCIENCE

RECOGNITION   PREDICTIVE MODELLING

DATA VIRTUALISATION AND DATA VISUALISATION

> "DATA SCIENTISTS ARE QUICKLY BECOMING CATALYSTS WITHIN A BUSINESS FOR UNCOVERING NEW PATTERNS, TRENDS, CORRELATIONS, AND RELATIONSHIPS TO REVEAL THE TRUE IMPACT SPECIFIC ELEMENTS OF OUR SOLUTIONS ARE HAVING.

JEREMY BRIM

PEOPLE FIRST DIGITAL TRANSFORMATION

Very often people are looking for technology products as sticking plasters to remedy symptoms when the causes of the problems are much deeper or larger issues. Just procuring a product is highly unlikely to massively impact your win rate, reduce your cost of sale or stem the tide and burden of bidding alone. Successful implementation and adoption of technology rarely happens when treated as an IT project in isolation.

Wherever possible I urge colleagues to follow wider principles of organisational transformation, with technology being an enabler rather than the objective itself.

SPONSORSHIP

Sponsorship is the biggest defining factor in the success of any initiative, particularly in this space. Whatever the business problem is you are trying to solve, you need somebody senior behind you to drive the initiative forward, be seen to lead and role model positive behaviours. It's far more important than just having someone senior to sign off the spend. Having a good sponsor on board will mean the initiative is recognised and spoken about in senior circles and therefore receives the right attention and resources. They also provide some limelight on the project which tends to attract more junior people to want to support and be engaged.

BENEFITS CASE

Before you attempt an improvement or indeed a technology product purchase, we should clearly understand the size of the prize. I'd recommend benchmarking your existing processes and approaches against best practices throughout the winning work spectrum from end to end. I would also recommend developing a thoughtful benefits case for change, accounting for quantifiable financial benefits as well as less quantifiable and non-financial benefits, such as improved wellbeing. While a robust benefits case will clearly be critical to gaining senior support and funding, it is also a useful tool to support the engagement of your wider community and fellowship or support for the initiative. Change initiatives, and particularly technology deployments, tend to fail where users aren't party to the benefits for them and the business.

SPECIFY TECHNOLOGY THAT ENABLES THAT TRANSFORMATION

You should only attempt to specify and procure technology to solve your problems once you've got a robust business case, a plan, and draft processes mapped out. Clearly the upcoming BQ Tech initiative by Bid Solutions will give a new level of insight on what products exist in the marketplace and how they are best placed to help. For instance, the requirements of work winning functions facing a smaller number of large complex competitive bids are very different to organisations facing a large number of smaller proposals. You should specify thoughtfully based on your needs and desired outcomes and spend time to ensure you procure properly.

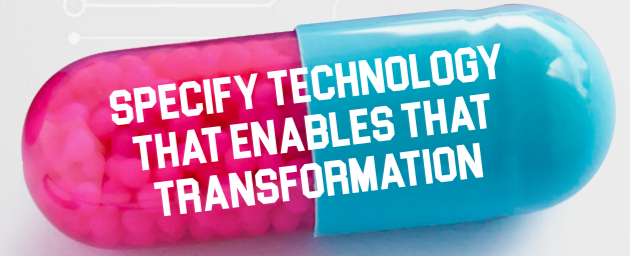## CLEAR OBJECTIVES, ROLES AND RESPONSIBILITIES

Like any project, improvement initiatives need consensus on clear agreed smart objectives and well-defined roles and responsibilities. We can't have two people both taking responsibility for an activity or having actions falling between stalls. Just like a bid plan, you should probably have a project execution plan that details objectives and responsibilities and schedules out the timeline for the project. This acts as your single version of the truth control document.

DESIGN CLEAR PROCESSES

Engage stakeholders across your work winning lifecycle to work together to draft your complete processes and approaches to winning deals. This will ensure nobody is left behind or feels left out, and the technology you require as enablers to those processes is properly thought through in terms of interdependencies and data flows. If relationships or stakeholder behaviours don't support the endeavour, then progress what you can. At least you tried to engage the business.

TECHNOLOGY: LOVE OR HATE IT?

SARAH HINCHLIFFE

I was tempted to start with the bold statement, *"I hate technology"*, but that would be too harsh even for me. There are just things about technology that I hate.

I hate the endless choice. Just how many options do we need? Whether I'm buying a new phone, a computer, a television, a wearable or whatever, I'm forced to go through a complex configuration of size, weight, colour, optional widgets, gadgets and apps...the list goes on. And I hate the fact that I end up using about 1% of what I've paid for. But that's my fault for being such a technophobe.

I hate the complexity. The simplest of functions and the smallest of errors demand endless internet searching, hundreds of half-answers and reams of meaningless instructions. I end up none the wiser and resort to phoning a friend, usually a younger person born with a smartphone in their tiny hands.

I hate the loss of traditional skills. Does anyone (other than me) read a map anymore? Or does the SatNav just do it? How many of us still do mental arithmetic? Don't we just reach for the calculator? And surely our memories are almost redundant when all we need to do is "ask Alexa" or open a browser.

Yet, as my fingers fly across my laptop keyboard, I can't say I miss the old days of typewriters, carbon copies, snail mail and landlines. Life was indeed more leisurely then. No one could (or would) contact me outside of work hours. Even so, I can't deny technology has enhanced our education, capability, productivity and entertainment, and I wouldn't be without it (even if I don't entirely love it).

> **THERE IS A RISK OF LOSING TRADITIONAL SKILLS. DON'T ASSUME THE SOFTWARE WILL FIX EVERYTHING. ARTIFICIAL INTELLIGENCE BUFFS MAY DISPUTE THE STATEMENT THAT SOFTWARE IS ONLY AS CLEVER AS THE PEOPLE THAT WRITE IT, BUT IT'S NOT A BAD GENERALISATION.**

In my early days of selling software, we would extol the virtues of this word processor and that workflow manager. Fortunately, I was taught well and understood the difference between a feature and a benefit and the importance of matching software functions to customer requirements. Working alongside savvy consultants, I also learnt about software aligning with a technology and information strategy, streamlining processes and getting the right people and organisational structures in place. All this needs to be straight before any technology has a chance of fulfilling a dream.

And the point of this extended preamble? Well, it's all relevant to proposal automation software.

There is an endless choice, as Bid Solutions' BQ Tech report will show. This is why it's essential to work out the problem(s) you are trying to solve and the outcome(s) you are trying to achieve. Doing a proper requirements analysis, developing a clear specification and running a structured selection exercise will help you to narrow down the choices. And before making a final decision and purchase, have a demonstration and consider doing a proof of concept or trial. The key message is 'don't be sold on a promise.' Instead, make an informed and objective decision.

There is complexity. Before you even start, recognise that getting the benefits from your new software goes way beyond buying and installing it. You need a change management programme to adapt processes, train users, communicate new ways of working to all stakeholders and set up help and support mechanisms. Consider creating 'super users' who become experts and can guide and coach others. And remember to do a 'benefits realisation' exercise – did you get what you expected and wanted from the software?

There is a risk of losing traditional skills. Don't assume the software will fix everything. Artificial intelligence buffs may dispute the statement that software is only as clever as the people that write it, but it's not a bad generalisation. Sure, software can increase productivity, accountability and timeliness, but we still need bid professionals to bring creativity, structure and discipline to our proposal strategies, resource management and writing.

> **SO, IN CONCLUSION, YES, OUR PROFESSION NEEDS TECHNOLOGY. THE RIGHT TECHNOLOGY WITH THE RIGHT PROCESSES AND THE RIGHT TRAINING. AND THAT LEADS US BACK TO THE REQUIREMENTS. GET THEM RIGHT, YOU'LL LOVE IT, GET THEM WRONG, YOU'LL HATE IT. SIMPLES.**

Please don't get me wrong – I do like technology. I enjoy all the things it can do to make our daily lives more interesting. However, in my experience it can get in the way of creating an effective bid!

First, I must point out that I am "old school". In a nutshell, this means I believe everything before 2000 is much better than anything connected with the technology that followed. "No, no!" you say. "What about internet everywhere and smartphones?" "How about AI and ChatGPT?" My response is they can all do interesting things but they actually get in the way of winning bids!

DEATH BY TECHNOLOGY

I accept simple tools such as word processors and spellcheckers are useful. I no longer own a manual typewriter. But I think much of the technology which tries to be cleverer or tries to encompass the entire bid space is counterproductive. I have several reasons for this and I think is the most obvious is security.

Security underpins many executives' inability to sleep at night, particularly when thinking about the bidding environment. The bid team holds the keys to the company's future. If any competitor gets hold of the information they have, the bid will probably be lost. This will have a direct negative impact upon the company, its individuals and departments, its market standing and its ability to prosper in the future. Executives tremble at the mere thought.

ANDY HAIGH

So "security" is imposed. Productive days are lost in security awareness training. Huge expense is put into physical and computer security systems which involve more training. Nothing can be done quickly; everything has to follow strict security processes. Forgotten or forced change passwords result in more lost time. All this reduces everyone's level of contribution and bid quality is diminished.

In the good old days, we may have had some (appropriately simple) security training. Then we would run the bid from its own room with directly connected computers and printers. Key information was on wall charts. We didn't need internet, VPNs, Wi-Fi printers. No one could get into the system without coming into the room. There was no disruptive security. Perhaps this wasn't perfect – but we could add someone to the bid team at a moment's notice. Plus, the bid team could actually talk to each other!

Next is database tools. It is great to be able to see other bid responses which cover the same topic area before we start writing our response to our bid...or is it? In my experience the opportunities to cut and paste large chunks of bid from old to new are infrequent. When it happens, the bid's focus becomes diluted. It just doesn't directly connect to the client's specific needs or situation. It uses text developed to meet a different need. I believe the best bid responses are written from scratch. They must be focussed entirely on the specific bid and customer requirements at that moment.

So why do organisations spend so much time and resources creating large databases of bid information? These must be maintained and updated. Users must be trained to find the information and, if it is up to date, extract it. All this to create a second-rate response. To my mind, using the money and resources to provide more bid writer capacity would achieve a better win rate. To reinforce my point, I have known large organisations who have bought such bid database systems then never put them to use. I say buy a bid writer instead!

Then there are tools which create a closed computer environment for all bid writers to work within. They seek to constrain the formatting and layout to a restricted, common style. When the final document is put together, formatting conflicts do not happen. The bid manager can peek at progress in real time and intervene earlier if things are not right.

In my experience, the bid team members do not like this. After all the training on how to use the system, they go away and do what they have always done. Then they cut and paste from their "usual" word processing system into the new one. Third parties are not easily included in the system and in any case, will generate their input separately. Once again, all this system training and management removes effort from the core issue – creating the bid.

Finally, there are smartphones. These evil and invidious devices are too small to see what a page of bid text really looks like. Bid text generated on a smartphone is always poor quality. Their main impact is diverting attention away from the bid. They steal focus with their various "alerts", to which the owner must respond immediately. Inevitably, the bid suffers.

My approach to getting a winning bid is clear. Keep it simple. Let the team use the software tools they are used to (but not tiny screens). Dodge anything which requires management and training beyond the basic bid processes – but accept you cannot avoid it all. Write the response from scratch, directly against the specific question and client. Allow time to integrate different inputs at the end of the bid. Then, review the final bid as a whole. Most of all, weigh all the "advantages" of technology very carefully before you allow any focus to be taken away from the core bid response.

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MY APPROACH TO GETTING A WINNING BID IS CLEAR. KEEP IT SIMPLE. LET THE TEAM USE THE SOFTWARE TOOLS THEY ARE USED TO.

ABOUT OUR EXPERTS

Olivia Hardy

Olivia is the founder of Catalytique Consulting, a professional services company specialising in Bid and Proposal technology and providing consulting and content creation services to B2B tech buyers and vendors.

In addition to managing strategic bids and writing proposals herself, she has also managed dozens of successful work-winning software implementations, giving her a unique perspective, both as a user and as a consultant, on how technology can enable business development.

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.

Darrell Woodward

Darrell Woodward is an award-winning consultant helping organisations unleash the full power of proposal automation to win more business faster. As a Bid Geek and coffee lover, he enjoys using coffee analogies to explain how technology enhances experiences and delivers efficiency. He believes bid professionals don't find bidding easy, we just love how hard it is but we need to stop the relentless drive for more human productivity and encourage more humane productivity.

Javier Escartin

Javier is an aerospace engineer who has climbed the corporate ladder from engineering to business development. He is a full-time freelance Proposal Manager and has recently launched a business to make our work easier with artificial intelligence.

He is the founder of DeepRFP.com, runs the proposals newsletter jescartin.com, and manages proposals for worldwide technology companies as a consultant.

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.

ABOUT OUR EXPERTS

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.

Charlotte Rees

Charlotte has worked in the bidding profession for nearly a decade, starting her journey as a bid and proposals apprentice for an engineering company. She has worked across several industries including IT services, facilities management and construction, and is currently an Associate Director Bid Manager, working within professional services. In 2018, Charlotte founded the Wellbeing and Inclusion in Bids and Proposals (WIBAP) community to target gender inequality within the profession and provide a space to share experiences and overcome the challenges we all face on a regular basis.

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.

Ceri Mescall

Ceri is a Work Winning Consultant based in Victoria, British Columbia, Canada. She is trusted to sustain, elevate, and transform bid and proposal functions. Over her 16 year career, Ceri has enabled clients to secure almost $1 billion in sustainable, profitable work. She's one of only 22 people globally (as of October 2022) who holds all four main APMP certifications. Ceri is also an APMP 40 Under 40 Award winner and an APMP Fellow.

Chris Kälin

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.

ABOUT OUR EXPERTS

Kathryn Potter

Kathryn's experience in bid writing covers sectors as varied as IT outsourcing to financial services, security services to reprographics and construction and rail. She sees content as the cornerstone of proposal development and understands that no matter what, it needs to be relevant and up-to-date.

Samantha Burns

Sam Burns CP APMP is a Senior Bid Manager at EiB. Sam has over 11 years' experience and has worked in both the private and public sector, helping clients win transformational projects across the UK and globally. She has a passion for technology and pioneering solutions in the full business development lifecycle.

Michael Brown

Michael Brown is a seasoned bid professional having won multiple projects across the built environment throughout Europe, the Middle East, APAC and North America. He is passionate about leading global teams to deliver top quality proposals and pitches to multinational clients.

Bella Stevenson

Bella started her career in bids over 15 years ago, co-ordinating EMEA-wide bid submissions for a recruitment consultancy. For the last 11 years, she has worked as a Bid Manager, mainly within the built environment, but also in sectors as diverse as facilities management, security, dentistry and most recently, the E-mobility sector with char.gy.

She enjoys collaborating with technical teams via workshops and review sessions to build win themes, install best practice and develop creative thinking to win more contracts and help organisations meet their business development objectives.

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.
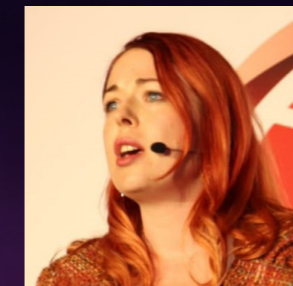
Larissa Cornelius

With over 12 years in business development and proposal consultancy, Larissa offers bid expertise across various industries. She has trained thousands of people and worked with over 260 companies on strategic bid work. She has a further seven years of operational management expertise and actively promotes the proposal profession by combining proposal best practices with her operational and sales background, helping businesses win more.

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.

Peter McPartland

Peter is recognised for his strengths in bid team leadership, innovation and performance improvement. One of the first law firm employees to achieve the APMP Certified Professional qualification, Peter is also a winner of an APMP UK national award for Innovation.

Jeremy Brim

Jeremy works with leadership teams and business owners as a consultant and advisor to plan and deliver sustainable growth through analysis and interventions across the sales cycle. Jeremy has also taken on leadership of the Bid Toolkit, bringing with him a wealth of bidding knowledge and desire to help businesses of all sizes improve their win rates.

Sarah Hinchliffe

Sarah has over 35 years' selling and bidding experience, which she loves to share through her freelance work, articles and presentations. A constant champion of creative storytelling and professional rigour, she never tires of encouraging sales and bid teams to join up, work as a team and win more business together.
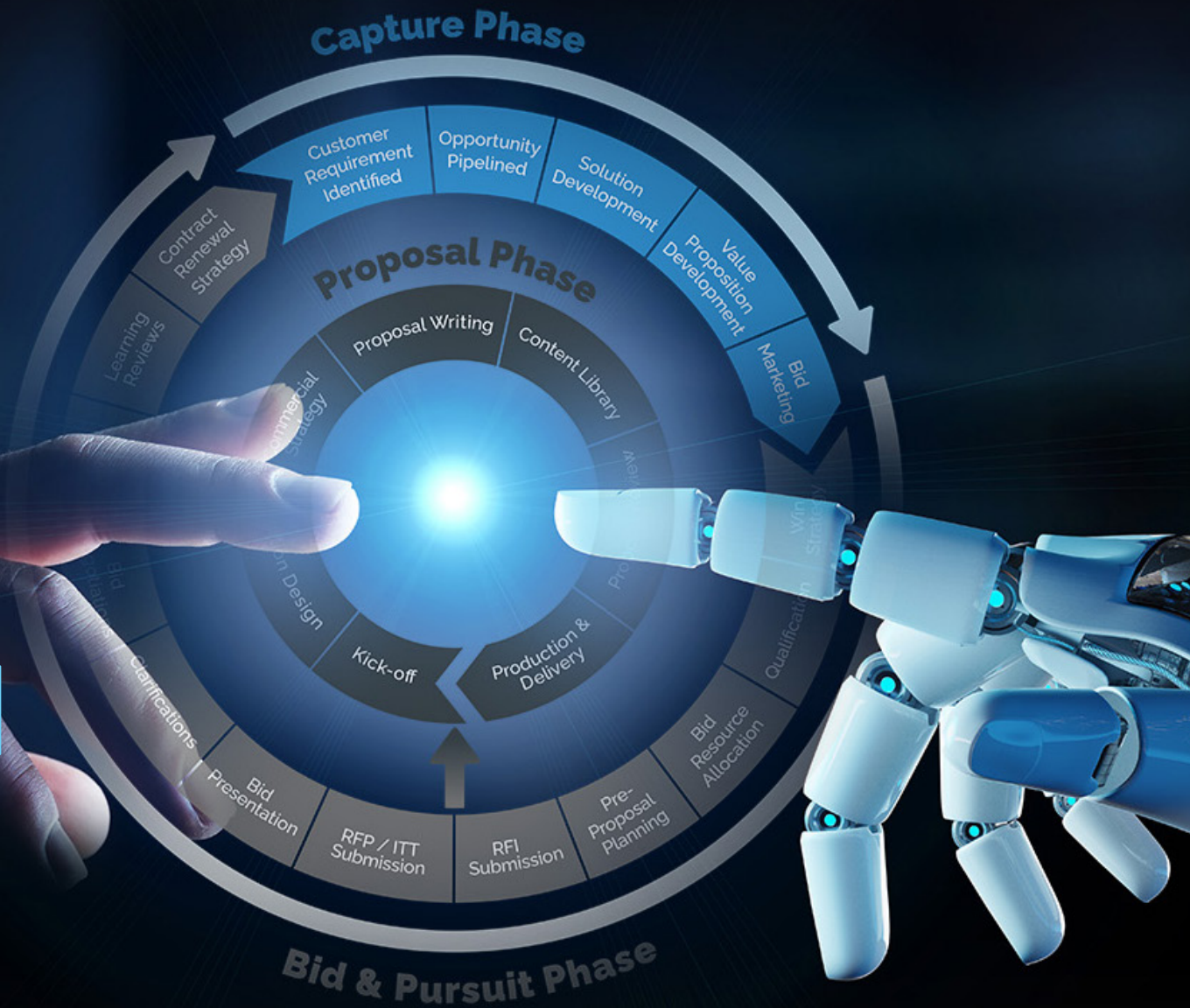
Andy Haigh

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.

BQ

BIDDING QUARTERLY

COMING SOON

THE A TO Z OF BID AND PROPOSAL TECH

Capture Phase

Customer Requirement Identified | Opportunity Pipelined | Solution Development | Value Proposition Development | Bid Marketing

Contract Renewal Strategy

Learning Reviews

Proposal Phase

Proposal Writing | Content Library

Win Strategy

Commercial Strategy

Design

Kick-off | Production & Delivery

Qualification

Clarifications | Bid Presentation

RFP / ITT Submission | RFI Submission | Pre-Proposal Planning | Bid Resource Allocation

Bid & Pursuit Phase

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