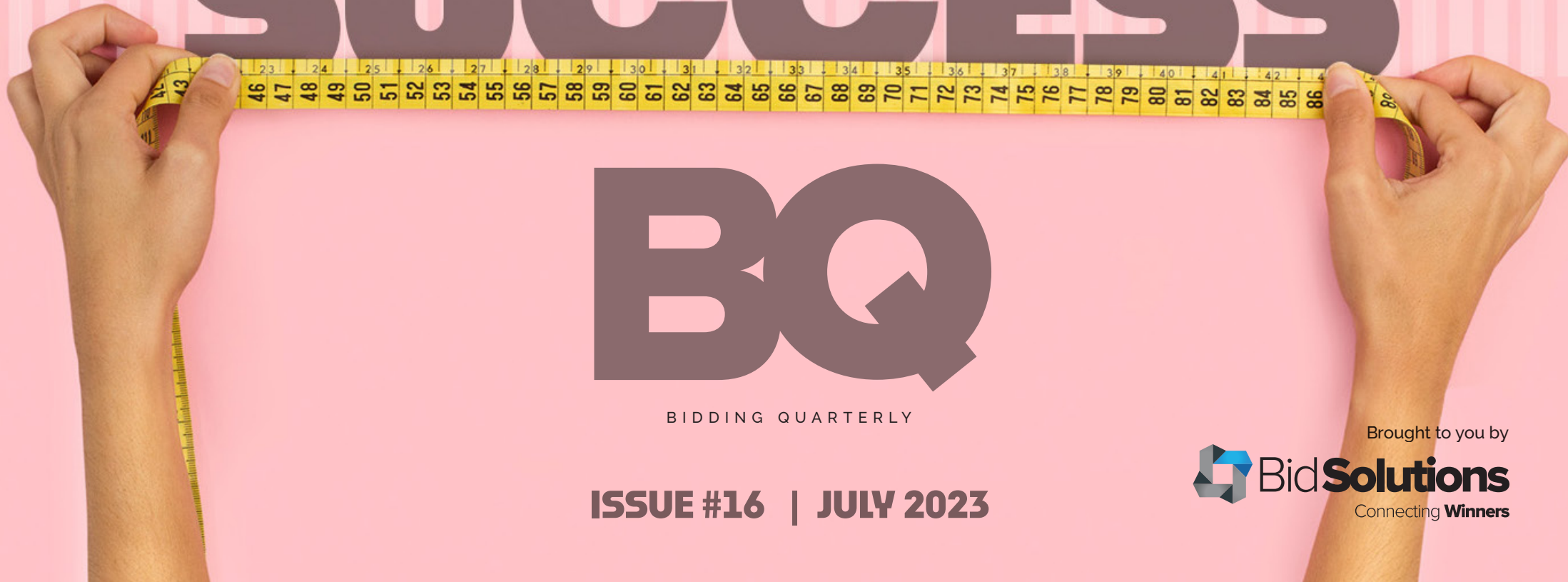


# PERFORMANCE MANAGEMENT AND MEASURING

# SUCCESS



# BQ

BIDDING QUARTERLY

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# FOREWORD

## MARTIN SMITH

*"If you are first you are first. If you are second you are nothing."* Bill Shankly, Liverpool FC

This quote really resonates with me. Though used in a sporting context it offers, in my opinion, a hard and often brutal truth about working in the bid and proposal profession.

We are absolutely in the business of winning. How you are measured or managed doesn't really matter unless you are winning – or at least winning enough to justify your cost to the business and shareholders.

Even a solid win rate isn't always enough. I've worked in bid teams who were made redundant without a second thought because shareholders' EBITDA expectations weren't met – even though they were contributing millions of pounds to the organisation's bottom line.

This experience has taught me bid teams should be as closely aligned to sales and business development teams as possible. Bid teams need to understand the overall business plan and take responsibility for their own commitments to the business. If you are not extrapolating how many winning bids are needed to ensure the business delivers its targets, you are not really aligned to where it is heading.

Creating and sustaining high-performance bid teams is an ever present challenge for most CEOs and Managing Directors. Organisations must adopt a balanced scorecard approach that considers a range of metrics to truly assess accomplishments. Quantitative metrics (such as revenue growth and profit margins) are no longer the sole (or accurate) indicators of team performance. Temperament, attitudes and emotional maturity, rather than education and skills, can often lead to sustained success. Qualitative factors (such as employee engagement, wellbeing and mental health, customer satisfaction, proposal debriefs, and learning reviews) are equally crucial.

Bid and proposal teams have some of the highest staff turnover rates of any profession. Have you assessed the impact of this on your organisation's success? If turnover is not a key metric, perhaps it should be. In our last salary survey, 29% of respondents had changed companies during the last year and 44% had changed within the last two years. 36% stated they expected to change organisations within the next 12 months. For reference, the typical UK annual staff turnover rate across all industries is 15%.

What does success look like for you and your team? If you can't easily answer this question, the 20 fantastic articles in BQ16 can help.

They offer more than 25 different metrics for measuring and assessing performance. Our contributors also share their knowledge and experience of what worked and what didn't.

In our continuous pursuit of bid excellence, we must accept and understand that success is an ongoing journey, not an end game. Coming second in bidding is painful (and sometimes very costly) – but it is often a necessary step on the journey to coming first.



# METRICS AND ME

CORPORATE  
FREELANCE

## CORPORATE METRICS

Back in the day, when I was employed (as opposed to self-employed, not unemployed!), my performance was always measured. As a salesperson, I had an annual revenue target, to which my employer's satisfaction, the size of my pay cheque and, ultimately, my job were inextricably linked. As each year advanced, I would be more or less stressed depending on how far or near I was from reaching my target.

To help manage my pipeline and create forecasts each year, I used 'funnel mathematics' – calculations involving ratios between cold calls, appointments, opportunities and closed contracts. The problem with funnel mathematics was that accuracy relied on consistent sales cycle time and opportunity value, which were almost impossible when selling IT services where these parameters varied wildly. So, it was accepted practice to sprinkle your figures with some personal judgement and manual adjustment. It became more of an art than a science and, thankfully, I generally hit my target and always kept my job.

When I became part of 'the management,' I became the measurer as well as the measured. I had to consolidate my sales team's pipelines and forecasts to feed into a company-level balanced scorecard. Managing my team's performance meant my sales life became more about spreadsheets and reporting than client relationships.

When I got more involved in the world of professional bidding, I discovered two new measures: a conversion ratio (the number of bids won as a percentage of the number submitted) and a capture ratio (the value of bids won as a percentage of the total value submitted). This was quite a revelation to me at the time, so much so that I went back to my boss and declared that we needed to amend the balanced scorecard to reflect my new-found wisdom.

So, we started to track conversion and capture ratios. Every month, we had a cute little graph that we all admired as long as the monthly trend went nicely upward. From plateaus and dips, we could easily see which type of problem we'd got – not enough opportunities, too few wins or too many low-value opportunities. It was, actually, rather good.





## FREELANCE METRICS

I can assure you I wasn't sorry to walk away from corporate metrics, but becoming a freelance bid professional triggered a new challenge. How to measure my performance now?

It didn't take me long to realise that I couldn't be held responsible for winning or losing bids because I would never control all the factors. As a bid manager, I would orchestrate a group of people responsible for decisions in a company I didn't work for. They could rely on me for guidance on bid best practices and bright ideas, but it was their strategy, solution and price that went into the bid – I just had to make it compliant, compelling and professional.

How could they judge me then if I couldn't be wholly responsible for winning or losing?

I started to set expectations with each client at the start of a new engagement and run post-project lessons learnt sessions with annual reviews for my long-term relationships. I found that different clients liked different metrics. For example, I have a spreadsheet for one client recording all my work and outcomes – bids I've managed that led to contract awards, with conversion and capture ratios, plus interim bid stages and strategic papers I supported. My client gets a good sense of what I've worked on and is happy.

I soon learnt that happy clients are the best measure of freelance success – if they keep coming back, refer you to their peers, give you testimonials and increase your fees every year without question, they are satisfied with your work. They will keep their own metrics for internal reporting and to justify buying your services.

## 'ME' METRICS

There is one other metric that is the most important to me. I remember doing some research early on in my freelance career and came across The Human Workplace <sup>(1)</sup> and a blog by the founder and CEO, Liz Ryan. It dismissed Peter Drucker's mantra, "If you can't measure it, you can't manage it" <sup>(2)</sup>, in favour of a more people-based approach. Having just left the corporate world, I rather liked this attitude. It reminded me of something an old boss of mine used to say: "Sarah, if you can look in the mirror every evening and tell yourself you did a good job today, then that's all that matters." I hold his words dear. I set myself high standards and if I can reflect on my day and am 100% happy that I did my best, that's a fine measure for me.



“““

**IF YOU CAN LOOK  
IN THE MIRROR  
EVERY EVENING  
AND TELL YOURSELF  
YOU DID A GOOD  
JOB TODAY, THEN  
THAT'S ALL THAT  
MATTERS.**

<sup>(1)</sup> <https://humanworkplace.com/>

<sup>(2)</sup> <https://www.forbes.com/sites/lizryan/2014/02/10/if-you-cant-measure-it-you-cant-manage-it-is-bs/?sh=71317ebd7b8b>



**MIKE READER**

# GOUDA PERFORMANCE MANAGEMENT MAKES BUILDING GREAT TEAMS A BRIE-ZE

“ DURING A VISIT TO THE NASA SPACE CENTRE IN 1962, PRESIDENT KENNEDY NOTICED A CLEANER CARRYING A BROOM ACROSS THE CONTROL ROOM. HE INTERRUPTED HIS TOUR, WALKED OVER TO THE MAN AND SAID: “HI, I’M JACK KENNEDY, WHAT ARE YOU DOING?”

THE CLEANER RESPONDED: “I’M HELPING PUT A MAN ON THE MOON, MR PRESIDENT!”





Setting a clear vision and strategy are critical to creating and sustaining successful work winning teams. Performance management must be aligned to that vision and strategy if you're going to succeed.

My view on the performance management and motivation of my team has been shaped by a classic story that I'm sure appears on every MBA and leadership school course content across the world.

I don't really know if the story is true, or if it's one of those fables that makes a point so perfectly that it becomes real...

"During a visit to the NASA Space Centre in 1962, President Kennedy noticed a cleaner carrying a broom across the control room. He interrupted his tour, walked over to the man and said: "Hi, I'm Jack Kennedy, what are you doing?"

The cleaner responded: "I'm helping put a man on the moon, Mr President."

The cleaner understands the importance of his contribution. He truly felt he was a valuable part of something bigger than himself. He wasn't merely a cleaner, he was a member of 1962 NASA Space Team.

Having my whole team working towards one set of common goals, and ultimately one mission or purpose, has always been fundamental to how I set out performance management and measurement. And, enhancing that, having that team aligned to, and bought into contributing to,

organisational goals and ambition. This is my ultimate goal. Whilst the cleaner putting a man on the moon is a great story, it can be hard to quantify how you create the motivational team environment in an everyday business. Not every business is boldly going where no man has gone before. So, rather than thinking about putting a man on the moon... I like to think about wedge of Swiss cheese.

I'm a visual person. A wedge of Swiss cheese is a great way to think about how an organisational ambition can be translated into both practical, tangible measures and performance metrics in a work winning team. In reality, this is just another management diagram, but making it cheese makes things tastier.

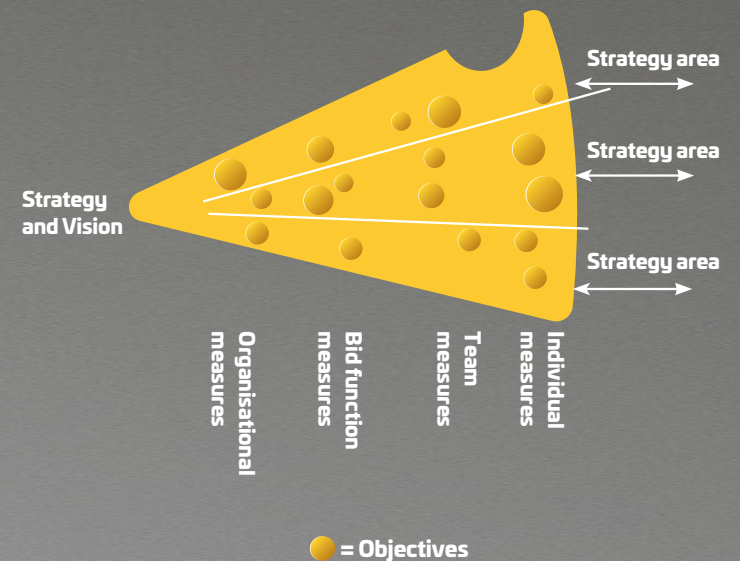
At the tip of your wedge is the vision and strategy of your organisation. This is the central focus of your work winning team. You are part of an organisation and your role is to create the jobs and opportunities that sustain the organisation long term.

As you move from the tip wedge to the opposite end, you can visually capture the objectives and goals the team collectively needs to meet to deliver the strategy.

From function to team to individual, performance goals need to align and relate to one another up and down that hierarchy. It allows people to understand the part they play and how they contribute to your overall objectives. And of course, as a wedge of cheese, if you put all the wedges together (each one representing a member of your team), you've got the whole wheel.

Too many objectives and you'll have so many holes in your cheese it becomes the diet version, with more air than dairy. A not very nice experience when eating it. And likewise, too few holes and it's clear this isn't premium cheese. Getting the balance right is key.

When our editor Martin Smith asked the question, "How do you measure performance?" for this edition of BQ, the answer for me was simple. Measurement is only as good as the context you put around it – and we measure performance by assessing how everyone in the team contributes to the success of others and the business as a whole.





**NIGEL HUDSON**

# PROOF POINTS

**"HOW DO YOU MEASURE PERFORMANCE?" WITH A BRIEF LIKE THAT, OUR BQ EXPERTS WILL INEVITABLY TALK ABOUT WIN RATES, CAPTURE RATES, PROPOSAL QUALITY, RETURN ON INVESTMENT, ACHIEVEMENT OF GROWTH TARGETS, AND IMPRESSING THE HELL OUT OF CUSTOMERS.**





These are the standard means of measuring success in bidding. Most of them, though, are measured on an aggregated basis - perhaps for a team, department or at a company level. How often do you see them measured at an individual level?

Let's begin with a close look at ourselves.

Imagine you're preparing for a big interview. It's for your dream job in bidding. You have your CV polished, case study examples are prepared, and your best suit is back from the dry cleaners. You're ready for this. Or are you?

You do some background research on the interviewing manager and discover that she has a reputation for being ruthless and only recruits the best talent. Hmm. Polished shoes and a nice smile won't cut it. You need to know the exact value you will bring to her business and, while you're at it, how you will be better than all the other candidates she'll see.

Tough gig, eh? Best that you and I sit down together for a quiet coffee, to help you prepare. The conversation might go something like this...

"Okay. The job advert's pretty clear: it's about winning business. I can see from your CV that you have many years in bidding, have plenty of relevant qualifications, and have worked on the right sort of deals to give you the required experience. You've got the BidMiles loyalty card and are worth an interview."

I'd then look you sternly between the eyes and say, "So how much are you worth, and if I paid it, how much would you win me?"

If you could answer me, I'd respond with, "And what proof points do you have?"

The brutal reality of our profession is that bidders are employed to win business. Pure and simple. We are part of a sales function and exist to bring in significantly more revenue and profit (and mitigated contract risk) than is spent on our salaries. The return on investment that our employer or client gets from us is dependent on the type of industry into which we are bidding - but whatever the number (let's say it's no less than ten times what we're paid), we need to be able to measure it.

So, I say again, "What proof points do you have?"

Time for us to gather the evidence.

Do you know your personal win rate this year, over the past five years, and in your career to date? What was your capture rate? What was the total value of contracts you won versus how much you were paid? How is this trending year on year, and why? Is it increasing because you're getting better at your job, or declining because you're working on bids that are harder to win? How do your stats compare to your team average and against your colleagues? Are you better or worse than them, and why?

If you don't already have one, I recommend you build a spreadsheet to track the statistics for all the bids you've worked on. It should include columns containing total contract value, profit, submission date, win or loss, new business or renewal, number of competitors, qualification score, proposal quality score, your role on the bid, customer feedback, the main 'lessons learned' outcomes, and a one-liner to yourself of the biggest thing you learnt on the bid. This will help you to record your achievements and add enough contextual narrative to explain the 'how and why' of your performance.

I've kept such a spreadsheet since 2004. It makes for interesting reading, especially when I look at my years of doing high volume 'fast and furious' commodity bidding (which produces lots of data) and how this compares to my more recent public sector bidding where one bid can last for years and the spreadsheet shows very little. And there are years when I spent more time training or managing others than submitting my own bids. But it all tells a story: that I am always focused on the value I bring to an organisation, hence my sense of worth and justification for what I charge.

Tracking personal performance metrics will put you in good stead for interviews and end of year performance reviews. But whilst win and capture rates get people's attention and help you to benchmark yourself against others, a less brutal manager should be asking you about 'how' you achieved your performance. What did you do to influence the outcome? How did you interact with and motivate your team or customer? Did you succeed on your terms, or sacrifice too much for the bid? And what were the soft skills you brought to the deal that meant you were a good fit within a team?

Whilst there's an easy way to measure success, always aim to 'lift' more than win rates. Be the catalyst within the team that energises and inspires others to achieve success. And have the proof points to evidence your value.



## RECOMMENDED STATS

- **TOTAL CONTRACT VALUE**
- **PROFIT**
- **SUBMISSION DATE**
- **WIN OR LOSS**
- **NEW BUSINESS OR RENEWAL**
- **NUMBER OF COMPETITORS**
- **QUALIFICATION SCORE**
- **PROPOSAL QUALITY SCORE**
- **YOUR ROLE ON THE BID**
- **CUSTOMER FEEDBACK**
- **MAIN 'LESSONS LEARNED' OUTCOMES**
- **A ONE-LINER TO YOURSELF OF THE BIGGEST THING YOU LEARNT ON THE BID**



**GRAHAM ABLETT**

# MEASURING FOR SUCCESS

**FROM MY PERSONAL EXPERIENCE WITHIN THE INDUSTRY, I CAN ATTEST TO THE IMPORTANCE OF USING METRICS TO MEASURE PERFORMANCE IN BIDDING. WHETHER I WAS WORKING WITH A MULTINATIONAL OR WITH OTHER SUCCESSFUL ORGANISATIONS LATER IN MY CAREER, USING METRICS WAS AT THE HEART OF OUR BIDDING SUCCESS.**

You have several obvious options to consider:

#### **Win rate**

Percentage won over number of bids. This is still a key indicator for me though some might argue there's more to it than the proposal (and surrounding activity). It's really important to be objective with this and include all of your closed deals...so no entries of 'no decision' on your log (e.g., if the customers don't tell you they've awarded the deal but have remained with their incumbent).

#### **Capture rate**

Percentage of deal value won over deal value bid. This alternative to win rate provides a different perspective. The difference in numbers shows if you're winning the bigger ticket deals or not and perhaps where your weaknesses are. Winning 27 deals in a row with a total of £290,000 revenue might give you a fab win rate but the loss of two £200,000 deals where you're the incumbent could get glossed over.

# SUCCESS





**METRICS PROVIDE AN ANALYTICAL APPROACH TO PERFORMANCE MEASUREMENT. THEY ARE ESSENTIAL FOR IMPROVING WIN CHANCES - EVEN IF THE CURRENT SCORE IS LOW. YOU SHOULD START USING THEM NOW (IF YOU ARE NOT ALREADY) TO CONTINUALLY ASSESS AND SIGNIFICANTLY IMPROVE YOUR SUCCESS RATES.**

### Proposal quality

I've seen this measured in two ways: capturing the customer's quality scores in their feedback (where quantified) and through a post-submission internal peer review (where a score is based on key attributes such as strategy, messaging, structure, writing quality and design). Both ways show two versions of the same important measure.

### Bid price

Not as commonly tracked but would include tracking the customer's pricing scores (where quantified). (This can often be reverse engineered to understand your competitor's prices.) It is also occasionally used as a measure of actual against price-to-win estimates from the capture process.

### Proposal efficiency

This metric measures the team's ability to deliver a high-quality proposal within a reasonable timeframe. More time should deliver higher quality but is this the case versus the volume of the submission? It's also important to measure if your customers are giving you less time (on average) to bid.

### Cost of bidding

A very important view of bid costs as a total over a year and also at a deal level. For example, do your public sector deals cost a disproportional amount of time and money for a much lower value contract? Or why did a particular deal cost much more than one of the same value the month before?

### Return on investment (ROI)

This measures the financial return generated by the proposal team's efforts. ROI can be calculated by comparing the cost of preparing the proposal to the revenue generated from winning the contract. (The last time I worked this out for a bid team the ROI was +1,100% - so no one could argue the value the proposal team delivered.)

Tracking these metrics provides an insight into the strengths and weaknesses of the team. It allows managers to spot trends, react and develop strategies for improving performance. But there's more you can do. The other key metric to capture is qualification score.

Let me tell you a story. A US multinational I worked with had a culture of bidding for everything. Qualification was a dirty word. And qualifying out was deemed against the winning culture of the organisation. As head of the bid team, I knew the opportunities we were supporting were not equally winnable (even though our win rate was north of 40%). We decided to use guerrilla tactics and developed a system of scoring each opportunity based on seven key questions to predict winnability. The team scored each opportunity for about six months (more than 100) until we had enough statistically significant data.

Using this rating scale, we created a picture similar to the example shown here. We were able to quickly identify the opportunities worth pursuing which provided a higher

chance of success. We also determined the threshold below which we never won a deal (I still remember this as being 37%). We would save valuable resources if we 'no bid' those.

The most interesting outcome for the management team came by asking, "How many more wins would we get if we moved the resources from the 'no hoppers' into the 'low win chance' bucket?" The question alone was enough to change the bidding culture of the company.

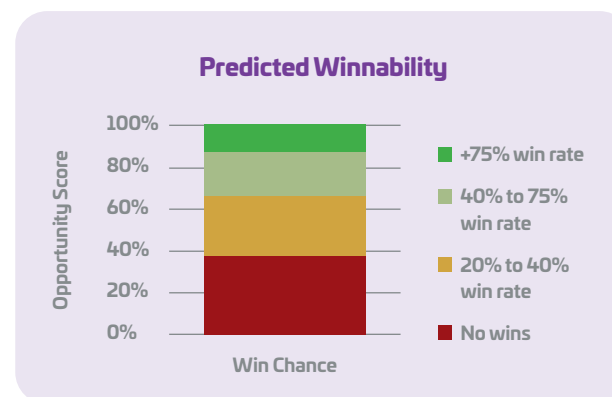
In another company we tracked results by score and also measured the type of opportunity, the service, and the strength of the relationship with our customers. This allowed us to better predict our chances of winning the bid. We noticed certain service lines consistently had a high win chance if the customer relationship was strong, regardless of whether it was a cold new business or hot retention.

On the other hand, some service lines were less successful, regardless of their score or the relationship. This more nuanced approach helped us qualify opportunities faster and also develop a better capture plan where we had time (i.e., what we could do before submission to improve our chances of winning).

Understanding the win chances by sector and type of opportunity was particularly illuminating. We could be highly strategic and prioritise efforts in sectors and opportunity types where we had a stronger track record. In contrast, we could reduce investment in areas where we weren't competitive. This focus helped us allocate our resources more efficiently and increased our chances of success.

We used these metrics to develop a sophisticated and customised approach to bidding. By not solely relying on score, we could predict our chances of winning, improve our approach and increase our probability of a successful bid.

Metrics provide an analytical approach to performance measurement. They are essential for improving win chances - even if the current score is low. You should start using them now (if you are not already) to continually assess and significantly improve your success rates.





# IN IT TO WIN IT

**WE WORKED ON AN ABSOLUTELY WONDERFUL PROPOSAL LAST YEAR.**

**THE PERFECT RECIPE: TAKE A DASH OF PROPOSAL STRATEGY AND A SUBTLE HINT OF STORYBOARDING. ADD A BLEND OF GREAT WRITING WITH THE DELICATE FLAVOUR OF FINE DESIGN. MIX IN A SOUPÇON OF PEER REVIEW TO TASTE. BAKE WITH SOME ELEGANT PROJECT LEADERSHIP.**

**JON WILLIAMS**

PROPOSAL STRATEGY  
FINE DESIGN  
PEER REVIEW  
STORYBOARDING  
PROJECT LEADERSHIP  
WRITING





The dish: visually stunning. Wonderfully written. Captivating win themes throughout the document. All creating empathy with and inspiring joie de vivre for the readers.

Dish? That's so singular. Because the written proposal was served with a fine array of accompaniments. The microsite, the exec brochure, the sparkling presentation collateral. If a certain brewer did proposals, this would be it.

#### **The evaluators loved it.**

So too did our client's CEO. One of the most senior people in their profession, with years of experience. Incredibly commercially astute. "By far the best proposal I've ever seen," came the verdict.

#### **Readers, it lost.**

A competitor came in at a fraction of the price. And when I say 'fraction', don't think 'half'. Think way lower than that. They'd come in with (how shall I put it?) 'a remarkably radical commercial offer'. (The phrase 'bought the business' always seems so crass, doesn't it?)

Perfect proof, then, that you can't measure proposal people on win rate, right? There's so much in the overall sales process we can't control. And we're not responsible for designing the solution or the cost and pricing model, are we?

So proposal teams look towards a balanced scorecard. Seeking client feedback at every turn. Measuring the satisfaction of key internal stakeholders with the work they've done. Objectively and independently assessing their capabilities and output using the best tools and experts out there. Passionately caring about the wellbeing, diversity and inclusivity of the team.

Sharpening their act and delivering efficiency gains, tracking the benefits of the improvement initiatives they initiate. Clearly articulating the contribution the proposal team makes to their organisation's overall health: 58% of our revenues flow from bids we've helped win. 67% of our colleagues owe their jobs to past wins. That sort of thing.

#### **But win rate?**

Here's the thing. Let's imagine your proposal team loses every deal it works on in the next twelve months. Would that feel right? Would your CEO or Sales Director be happy with the 'Not our fault, guv' refrain? Obviously not.

#### **Then win rate does absolutely, fundamentally matter, right? We're all agreed.**

If you're not in it to win it, you're in the wrong game. Winning is our goal, whatever your contribution to your proposal team. That's why they pay our bills. And that's why our mission must always be to win more, and win more easily.



**THE DISH: VISUALLY STUNNING. WONDERFULLY WRITTEN. CAPTIVATING WIN THEMES THROUGHOUT THE DOCUMENT. ALL CREATING EMPATHY WITH AND INSPIRING JOIE DE VIVRE FOR THE READERS.**





# HOW LONG IS A PIECE OF STRING?

KATHRYN POTTER

## (AND WHICH PIECE OF STRING ARE WE TALKING ABOUT)?

This is an interesting question as a contractor/freelancer in the world of bids and proposals. How do we measure performance? What are our metrics? As contractors we don't have a list of projects we can always say we have been involved in since the beginning of a bid, or even that we know the outcome once we've done our bit and moved to the next contract. It's tough when we have to prove success rates or provide performance metrics.

“ ”

**A TEAM WITH A 25% WIN RATE MAY ACTUALLY BE AS SUCCESSFUL AS A TEAM WITH AN 80% WIN RATE - JUST BIDDING ON MORE ITEMS THAT ARE POORLY QUALIFIED.**



It made me question how we measure success in bids in general. Win rates? Scoring? Retention? Places on a framework? Quality scoring? Amount of time saved through reusable content?

So often win rates and successes are held up as the primary metric for performance. As we all know though, win rates can be horribly skewed and not indicative of actual success if there is a poor bidding strategy in place. What about all the times we lose on price, yet have impeccable quality scores? Or when it's about bidding everything 'just in case'? A team with a 25% win rate may actually be as successful as a team with an 80% win rate – just bidding on more items that are poorly qualified. And is qualification the responsibility of the bid team or the sales team? How many salespeople decide something is a must-bid and get it through Bid/No Bid by fudging information?

The longer I work in proposal management and bid writing the more I think we need to develop a better set of metrics. One that takes into account the complexity of what we do, measuring how quickly (against set timelines) things like Bid/No Bid results are reached, how quickly we can get responses from contributors and whether we meet the project timelines we set ourselves for reviews. All this without working through the night or spending weekends working when we should be spending time with our families or recharging.

Why not factor into our metrics the cost of a bid against the profit we expect to make if we're successful? Or how many hours it takes to produce high-quality compelling responses and work out how we can improve performance against this? Or look at how many of the responses we wrote made use of reusable content?

### LET'S CREATE A WORLD WHERE:

**Organisations define their Bid/No Bid criteria better and actually implement them**

**Sales/Business Development and Bid/Proposal teams work closer together to understand, share and develop capture plans**

**Time management and effort are understood and used in planning responses**

**Bid and proposal teams are engaged from the beginning of a pursuit**

**We really understand and evaluate WHY we want places on frameworks and whether they're actually used**

**Retention bids/proposals and what they entail are better understood and there is more communication across the organisation (from way before a contract is due to renew) and we measure how much work we retain (and if we lose it, understand why)**

**There are rewards for being efficient and implementing efficiencies**

**Senior Management and SMEs are rated on their commitment to contributing**

**We measure how many weekends/late nights are NOT worked**

**IF WE CAN CAPTURE THESE SORTS OF METRICS AND EVALUATE WHETHER WE'RE IMPROVING AGAINST THEM I THINK WE WILL ALL BE MORE SUCCESSFUL AND PERFORM AT HIGHER LEVELS.**



# PERFORMANCE



# CRAFTING A WINNING SAGA:

## PLAY THE GAME OF PROFESSIONAL GROWTH

**DARRELL  
WOODWARD**

**I DON'T MEAN TO BRAG BUT MEASURING PERFORMANCE AND SUCCESS IN MY CAREER IS INCREDIBLY EASY FOR ME. I CAN TELL YOU THAT AS OF RIGHT NOW I'VE ACHIEVED LEVEL 311. I'M SPECIALISED IN ONE OF THE MAIN SCHOOLS OF LEARNING, ALL MY SKILLS AND ABILITIES ARE MAPPED OUT ON A DEVELOPMENT TREE, AND I HAVE A RANGE OF TOOLS AVAILABLE TO ME THAT ENHANCE MY WORK IN SPECIFIC AREAS.**

More importantly, I know exactly what I need to do to reach the next level: which books I need to read to increase my knowledge and the tasks I need to complete to build my experience.

This process of writing my own saga is addictive, highly enjoyable, and I can only fail if I give up before achieving my goals. The only problem is the career I'm describing doesn't pay anything and involves killing large numbers of Saxons in 9th Century Britain. Yes, you guessed it, this is the career of my Viking character in a popular video game <sup>™</sup>.





**“By Odin’s beard, raiding ain’t no game,” my character might have said. “It’s our way of life, and we take it seriously. So, measuring my performance level is important to ensure I am contributing to the clan and earning my seat in Valhalla.”**

How is this relevant to the career of a bids and proposals professional in the 21st Century, when stealing silver, razing villages and exceeding the word count are generally frowned upon? Well, gaming is no mere pastime. It’s an industry valued in excess of \$300 billion <sup>(1)</sup>, more than the markets for music and film combined. Part of this success is the deliberate design of problem solving, goal achievement, and patterns of rewards to keep players’ attention and induce positive feelings. Gamers undertake quests, develop their character, and level up in much the same way we might work on a bid, pursue personal development goals, and earn promotions. So, why doesn’t our professional performance management feel engaging and rewarding in the same way?

**“Thor’s Hammer, Darrell. It’s simple. My Jarl gives me arm rings as a reward for making them rich and skalds sing of my victories in battle. Doesn’t your clan show the respect due to a fellow warrior and celebrate your glory?”**

Ummm...no. It’s often unclear how employees will be rewarded by organisations for performance improvement. Performance reviews are often explicitly uncoupled from pay rises and promotions. Not very motivating! Part of the problem is the old linear corporate ladder no longer exists because organisations need to adapt to the marketplace more quickly, making it hard to predict which skills and resources they’ll need in future. This leaves many employees with no idea what they need to do to progress because their employers aren’t sure either.

Increasingly, workers are taking more control of their career progression and that means they’re able to explore a wider scope of skills and knowledge to augment their domain expertise. The challenge is how to keep control of it all. Now, where have I seen a fully integrated performance tracking, management and rewards system?

**“Freyja’s blessings. A Norse warrior knows how to earn silver and reputation. I complete quests, master my skills, acquire knowledge, learn to use new tools, and gain experience just like in any other trade.”**

In gaming, character development is a crucial element. Players start as novices and gradually progress through the game, gaining new skills, abilities, and experience leading to fresh storylines. The main way players develop their character is by completing quests. Quests are simply a series of objectives players must complete to progress through the game. Completing quests provides players with rewards, such as experience points, in-game currency, and items. What’s so addictive about character development in gaming is that the financial and status rewards are not the end goal. Instead, they open up the next tier of achievements to attain. As players progress through the game, they accumulate experience points to level up and gain access to new abilities, skills and quests.

The same principle applies to the workplace. Employee development is essential to any successful organisation. As we learn new skills, our performance improves and we become more valuable to our organisation. At the same time, we are more engaged with our own development and accomplishments, encouraging us to seek new opportunities to level up our workplace character.

Gamifying performance management means setting and completing quests, side quests, and jobs. Quests move the main storyline forward so should be aligned with the organisation’s goals and objectives. Side quests follow optional storylines to expand our experience and help us build the skills to complete main quests. Jobs are short, repeatable tasks for gaining small rewards. But what quests, side quests and jobs are available to bidding adventurers? Your character development is specific to your chosen story arc and your adventure must be challenging but achievable: earning certifications, gaining experience, sharing knowledge, exploring new ideas, testing innovations, helping others, improving processes, etc.

Perhaps my character can share some final wisdom?

**“A mighty warrior needs a challenge worthy of a true Viking spirit. A challenge not too simple nor too daunting, where every warrior has an equal chance to prove their mettle. The writing of my saga does not harm the reputations of my siblings but only serves to increase the power of our clan. And while I may fail in many attempts, the gods restart the quest until determination and perseverance bring victory within my grasp. Embrace the adventure, channel your inner Viking strength, and embark on an epic journey of discovery!”**

<sup>(1)</sup> If you know, you know.

<sup>(2)</sup> Gaming: The next super platform – Accenture, 2021



# SUCCESS IS ABOUT MORE THAN METRICS

## 'WHAT DOES A SUCCESSFUL BID AND PROPOSAL TEAM LOOK LIKE?'

There's no doubt that adding the 'bid and proposal' terminology draws our minds straight to winning work. And yes, winning work is undeniably a core part of our success as bidding professionals.

But a successful team is about more than its outcomes. It's about team happiness and health, the team feeling valued and integral to the business, and the team being invested in and rewarded.

It's also no secret that happier teams can drive efficiency, productivity, generate new ideas and improve outputs within a business – which for us ultimately means winning more work!

So it's about more than the metrics. I like to think there are three key components to measuring team success:

**CHARLOTTE REES**



**INPUT TO THE TEAM**



**THE TEAM**



**TEAM OUTPUT**



## INPUT TO THE TEAM <<<

A successful team starts with successful input and leadership. Senior members of a bid team are responsible for developing a great team and leading them to success. The leaders of the business are also responsible for supporting, positioning and investing in their bid team. What does success look like?

- **A diverse team:** with a mixture of backgrounds, insights, experience and personalities
- **Clear strategy and direction:** the team knows where they are heading, and how they (as a team) plan to get there
- **Defined roles and responsibilities:** everyone knows who does what, and the team has a clear management structure with support and routes to escalation
- **Architecture and process:** the team is given tools and processes that support them to operate in the most efficient way
- **Investment:** the bid team is given time (and money) to undertake personal development and learn new skills
- **Reward and remuneration:** the team is paid fairly and is effectively rewarded for the work they do

## THE TEAM

For me, a healthy, happy team underpins success. I believe that putting people first is at the heart of any successful team. So what does this look like?

- **Purpose:** the team feels they have a purpose as individuals within the bid team, and within the wider business as a bidding function
- **Health and wellbeing:** the team's physical and mental health is a priority – the team is protected from burnout, and transparent conversations and discussions around health adjustments and mental health are encouraged
- **Communication and support:** the team communicates well and is transparent. They can depend on other members in the team, and on the team leadership. In times of stress or uncertainty, everyone feels fully supported
- **Resilient:** the team overcomes challenges, adapts to change, and learns from setbacks
- **Motivated:** it's evident the team has a positive attitude and an ambition to learn, develop and succeed
- **Safety:** the team feels physically and psychologically safe. They feel secure in their roles and feel safe to be vulnerable, speak out and share their opinions within the team, and the business

## TEAM OUTPUT >>>

In bidding, we know our role, and our team's role, is to win work. So it makes sense to measure part of our success through work winning metrics. These metrics could include:

- Team/individual win rates or value/fees won
- Achieving defined goals such as X number of bids in a year
- Assisting with sales targets
- Growth year on year
- Winning awards

Successful bid team output can also be about:

- **Quality of bids:** we strive for our bids to be competitive, with high quality content and solutions that meet clients' needs
- **Organisational positioning:** the bid team should be seen as trusted strategic advisors and be given the opportunity, as a core part of the sales cycle, to influence the overall business strategy and its approach to winning work

## WHAT DOES THIS ALL MEAN AND WHAT CAN YOU DO?

There are many different ways to measure a bid team's success but a crucial part of that is the happiness and healthiness of the team itself. The metrics are important, but if your team is happy, enjoy being part of the bid team, and enjoy working within the organisation, then this is a success that shouldn't be ignored!

To better understand the success and performance of your bid team, there are four simple actions you can take:

1. **Feedback:** undertake a full review of the bid team's people, leadership, outputs and impact on the wider business. Use 360-degree feedback and data analysis to get a true reflection of the team's current position. You may want to start with some of the key topics mentioned above.
2. **Evaluate:** review your feedback – what are the key trends, what are you doing well and what could be having a detrimental impact on your team's success?
3. **Prioritise:** taking your evaluations list, categorise your areas of improvement into must haves, nice to haves, and value added items. This will enable you to

develop the most effective performance improvement plan.

4. **Target:** define your actions and timescales from your prioritised list. Use SMART objectives wherever possible to assist with tracking progress and reviews.

This approach isn't linear, it's a cycle allowing you to continue to gain feedback and ensure continuous improvement within your bid team in the long run. And finally, continue to communicate – give your team a safe space to say what they think, and make time for discussions around continuous improvement.



# "OF COURSE WE SHOULD MEASURE SUCCESS!



# OTHERWISE, WHAT'S THE F\*\*\*\*\*G POINT?"

**Now that I've got your attention, let me explain.**

We all need targets in life. Most of the time we don't even realise we're setting them. Simply arranging a coffee with a friend at quarter past ten creates a target. (Who has that friend who's always late? Annoying, isn't it?) But in the white heat of business, targets are there for a reason. Organisations must be seen to be growing. There's no resting on laurels, is there? If you have a great year, you can't relax and celebrate for long because the world is watching and expecting you to have an even better one next year. Which means someone has to set targets and someone else has to hit them.





It's that simple, really. These targets don't necessarily have to be about the bottom line, either. You might be looking for improvements in behaviour, or reducing your carbon footprint, or increasing inclusivity...all kinds of things for which you can give yourself a target against which to measure yourself. It's the simplest way to confirm you're heading in the right direction and succeeding in whatever achievements you've set.

Here, of course, we're talking about our experience in the bid world. I've spent many years working with bid/proposal professionals and I can assure you they were/are a competitive bunch. Let's not forget we work in a field called 'work winning'. There's literally no prize for coming second! But you can't win 'em all, so when it comes to measuring success, I like to look at four separate areas.

## Win rate

Without question, you cannot ignore win rate when quantifying your team's success. (And I'd like to stress that this is all about your team, not the individual. Bids and proposals require collaboration and 'teamwork makes the dream work'.) How many bids did you win? And how many did you expect to win? How many of those wins were unexpected, and the result of particularly good work from your team? If your reward structure allows it, set a target and a stretch target that will link to a higher reward or perhaps an additional bonus for your team. And be honest. We know sometimes your organisation might override your no-bid recommendation for strategic reasons (I know, right?) so don't include these in your appraisals.

## Quality

You can't ignore the value of quality. Of course not. A high-quality response to a bid you didn't win will have impressed the evaluators. They'll remember. If you want to be known as a company with high standards, you'll need to find ways of measuring the quality of your work. I recommend:

- **Proposal reviews** - review a percentage of each individual's proposals at a regularity that works – half-yearly would be my suggestion (you'd perhaps review more regularly for a newer member of staff)
- **Evaluation scores** - this won't be available (or as transparent) in the private sector but scoring feedback should always be received on public sector bids. This can be a factor that feeds into the overall proposal review
- **Client debrief** - there's nothing better than hearing it straight from the horse's mouth! Comparing the quality of your submission against the competition is one area you can question in a debrief, providing essential feedback to the individuals involved



## IT'S THE SIMPLEST WAY TO CONFIRM YOU'RE HEADING IN THE RIGHT DIRECTION AND SUCCEEDING IN WHATEVER ACHIEVEMENTS YOU'VE SET.

### Behavioural

It's a bit of a cliché, but you need everyone in the boat pulling together. All organisations will have their own processes and outlooks, and they'll all have specific behaviours expected of their people. You need to know whether employees are behaving as you want them to and that they live up to the values expected of them. This can be seen as subjective so requires tangible evidence – of positive behaviours to celebrate and of any areas for improvement. This can be at individual or team level or both, to encourage working together to achieve common goals across your team.

### 360-degree feedback

Firstly, this needs to be 'bought into' within your organisation. Otherwise, people won't make the effort to contribute. Agree the areas you'll discuss and the set of questions to be asked with your team. Share these in advance with key stakeholders in your business so they know what to expect to be asked should they be approached for the feedback. Then jointly agree the individuals to interview separately with each team member so everything is transparent and fair and seen as a positive exercise for development.

In our business, we need targets. We thrive on them; they keep us ambitious. We want to succeed. If we don't measure success then... what are we even doing here?





# MEASURING BIDDING AS WHAT IT IS: SALES



## JAVIER ESCARTIN

When talking about professional topics publicly, especially when authoring the content, I have a rule: only talk about what you have tried or done. I apply this to my talks, posts, and newsletters.

When the BQ team asked me to share my thoughts on bidding performance management and measuring success, the structure of this article was very clear.

First, I'll share what I've seen as an employee. Then I'll talk about what I've implemented as a freelancer. Finally, I will give you my conclusion (and a tip). You can see this is going to be a lot about me and my experience. The point is for you to take what I've learned and (maybe) benefit from it within your particular scenario.

### The Employee Story

The first time I worked in a proposals business function was for a large company in the European space industry. How an aerospace engineer ended in proposals is a story for another day.

The role title was Business Development something. Because of the nature of the space business, that job was 80% bid management. Yes – at that company, proposal professionals were sales. Period.

As sales, my boss monitored mainly one metric: money invested in proposals to win a million in revenue. That was it.

And I liked it.

A clear amount that linked our performance to the whole business development function (and its perks, including bonuses). If that metric was under a certain amount, we were OK. If that metric decreased, we were doing great.

Depending on the year, we targeted decreasing it in different ways: bidding more efficiently, for bigger contracts, for better-suited contracts, and so on.

Simple and effective, it had one non-obvious impact: upper management perceived us as an investment, not a cost.



## The Freelance Experience

In 2018, I quit that job to think about what to do next. After a while, I didn't feel like looking for another one so I started freelancing to extend that gap a little bit. That side gig became full-time until the recent proposals AI business took off. Note for context: most of my consulting clients have been small to medium enterprises.

As a freelancer, you must differentiate between two metrics types when analysing performance and success: your consulting operation (maximising income per hour worked which, curiously, is not about charging hourly) and your clients' operation.

Let's talk about the latter.

I kept the mindset gained as an employee. I presented proposals as an investment whenever I had the opportunity. I invited my clients to measure money invested per revenue generated.

The same fundamental metric in a slightly different form could be called 'bidding better'. It helps both sides and reflects improvements, is more efficient and leads to better-suited RFPs.

In a few cases I was called in to support companies with an existing internal bidding function. Those companies, which measured proposals as a cost unlinked to revenue generated, had the worst bidding departments (though the sample of these is small, you should take my experience with a grain of salt.)



## Conclusion

I'm convinced proposals are sales. Harder, with nuances, and not what most people understand by 'sales' but sales, after all. As such, performance success metrics should be linked to revenue.

This was the case in my team as an employee. It's what I've used as a freelancer. But I've learned over the years it is not for every proposal function.

I think many problems start when executives see proposals as a cost.

Many teams fall into the trap of using bidding performance metrics about costs unlinked from revenue generated. For example, the 'cost per bid' doesn't tell you the result of that disbursement. It signals the message that proposals are like administrative support – a business cost that doesn't directly impact revenue and growth.

The main argument I often hear against this is that many things influencing wins are out of the bidding teams' control. And that's true – but it's as true with any other business functions. No team has total control over wins because we're selling, not buying. But that doesn't prevent other teams from claiming wins as theirs and being compensated (sales bonuses being the typical example).

### (And a tip)

Not linking bidding performance and success metrics to revenue is comfortable at the beginning. You don't have the pressure to win. But it's a trap in the long term - because the function, in the eyes of everyone else, becomes a cost instead of an investment.

And what do all companies on earth do with costs? Cut them.

And what do they do with investments? Pour in resources as soon as the ROI is enough.

Isn't it clear where bidding should be?



**I PRESENTED PROPOSALS AS AN INVESTMENT WHENEVER I HAD THE OPPORTUNITY. I INVITED MY CLIENTS TO MEASURE MONEY INVESTED PER REVENUE GENERATED.**

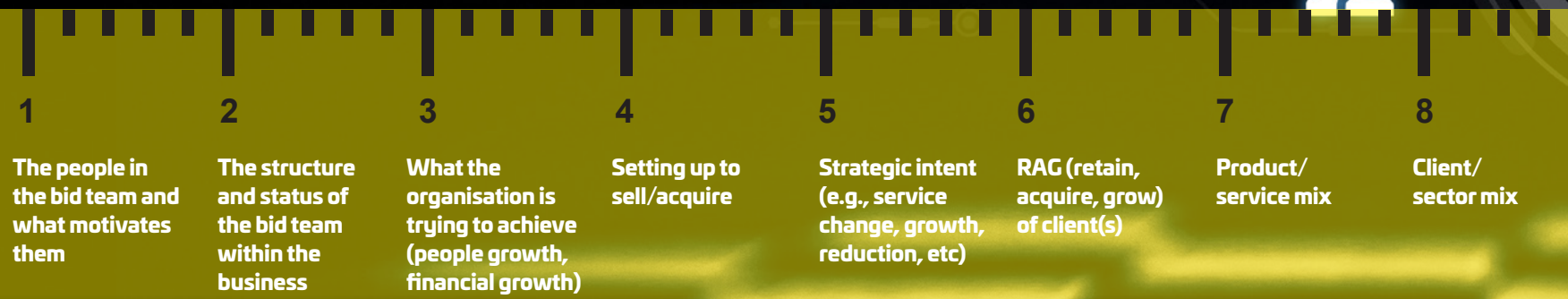


# MANAGING PERFORMANCE, MEASURING SUCCESS

**I HAVE BEEN A LINE MANAGER FOR BID TEAMS ACROSS FOUR DIFFERENT INDUSTRIES AND WORKED FOR MANY OTHERS OVER MORE YEARS THAN I'D CARE TO REMEMBER. IF ANYONE SHOULD HAVE A CLEAR AND DEFINITIVE PERSPECTIVE ON HOW TO MEASURE A BID TEAM'S SUCCESS IT WOULD BE ME, RIGHT?**

And yet, and yet, and yet...

It's far from easy to put hand on heart and say: "This is how I measure success." There are so many variables. Here are a few off the top of my head:



1	2	3	4	5	6	7	8
The people in the bid team and what motivates them	The structure and status of the bid team within the business	What the organisation is trying to achieve (people growth, financial growth)	Setting up to sell/acquire	Strategic intent (e.g., service change, growth, reduction, etc)	RAG (retain, acquire, grow) of client(s)	Product/ service mix	Client/ sector mix



Having said that, there's one magic metric I do believe in - win rate. Definitely measure win rate for deals closed - not those open ones that drag on and skew the data. Ditch those.

Include everything the bid team is supporting whether proactive, reactive, formal, informal, full or light support. Remember this is a team sport; don't target individuals. Also ensure there is enough metadata to measure a few other things such as:

- **Win rate by sales team/sector/size of client/individual**
- **Time spent on the bid (by the bid team and by other contributors if possible)**
- **Quality score**
- **Customer comments**
- **What steps were missed (e.g., kick-off meeting, strategy review, pre-planning, lessons learnt)**

We convince ourselves we do all this for every bid but let's be honest, we don't!

I used to compile simple, quarterly one pagers for each team using the bid services (sales team), a consolidated one for my boss and other stakeholders (like legal) and then ad-hoc ones to help me with other things. I'd use win rate at a granular level to tweak qualification, manage resources, justify approach, and discuss upcoming deals with the sales teams.

#### **Quality score**

It should go without saying that quality and win rate are closely related. You'll have different strengths and preferences within the team, with individual personalities bringing individual insights. This is gold. You want them to learn from each other, even when they're not directly involved on the same projects. Every month I expected colleagues to read one bid from someone else on the team and score it as a percentage. This provided me with a useful quality audit to set increased quality targets annually. It also highlighted those team members who were particularly strong in certain areas (writing, cover design, graphics, document management).

#### **Bid and sales teams must be friends!**

You simply must know what the sales team are up to! If you head the bid team it's your responsibility to know what's in their pipeline and how you are going to support them. If the bid team doesn't win the work, the sales team have nothing to sell so we need to work together to help them. Use all

that rich data I mentioned above. And work backwards. Find out how much they need to achieve and if that's new business, retained or a mixture. What's the average deal size? How many will it take to fill the funnel based on their actual win rate? Is it achievable (because you know how long each deal takes) with the resources available? If not can you create another above-the-average outlier deal? A positive relationship with your sales leaders allows you to work together on this analysis, keeping you all focused and aligned. All it takes is the one thing nobody has enough of: time. Find it.

#### **Show me the money**

Bid teams work in a high-pressure, commercial environment. It's competitive; there's no getting away from it. It's all about winning after all. Financial rewards are important when you consider the value of a good bid team to a company that lives or dies by the deals it wins. And that means money, of course. I'm still asked whether I believe in targets and commission for bid teams. And I still say absolutely not. When a big deal lands and the salesperson gets a big bonus, the bid team deserves more than a bottle of Rioja (if they're lucky).

Bid teams should be paid well, commensurate with their importance to an organisation. As far as remuneration goes, be fair. That means pay your team a good and appropriate salary in the first place (much more than the sales basic). Reward the whole team with bonuses based on organisational targets. Expense their meals if working late (sure, working late isn't right but it's sometimes unavoidable) and be aware of things like time off in lieu. Show them you care.

What goes around comes around. I occasionally took my whole team for breakfast. No strings. Just as a thank you and a chance to talk outside the office environment. Sometimes you just can't beat tea and chocolate, can you? Little things can make a big difference.

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**BID TEAMS WORK IN A HIGH-PRESSURE, COMMERCIAL ENVIRONMENT. IT'S COMPETITIVE, THERE'S NO GETTING AWAY FROM IT. IT'S ALL ABOUT WINNING, AFTER ALL.**







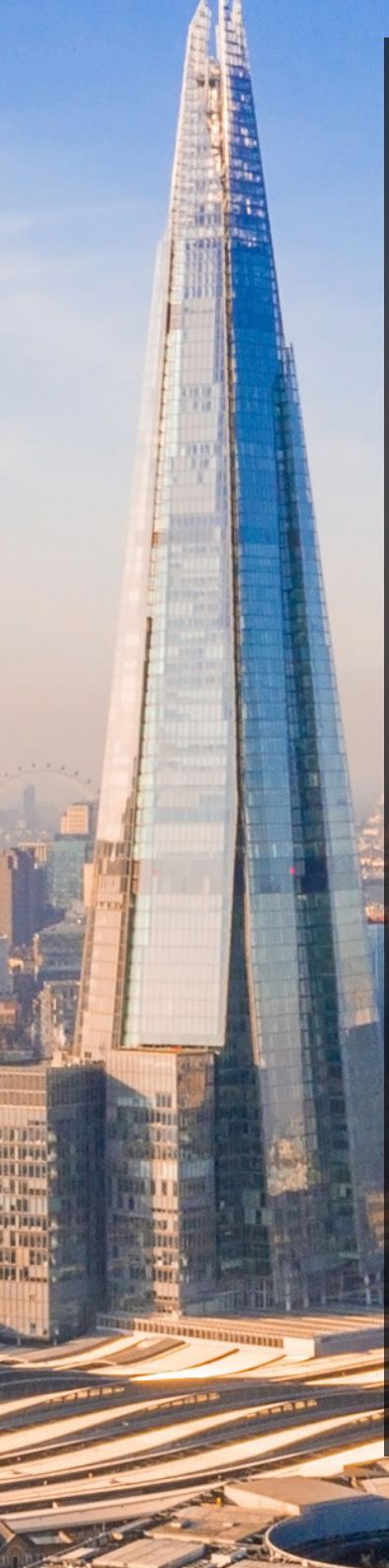
**WHERE WE ARE WORKING WITH CLIENTS TO DESIGN THEIR OPERATING MODELS AND PROCESSES FOR GROWTH, WE ENCOURAGE THEM TO TAKE A MORE HOLISTIC VIEW - LOOKING TO SEE THE BIGGER PICTURE WHEN IT COMES TO THEIR RETURN ON INVESTMENT IN WINNING WORK.**

# ROI

# SEEING THE BIGGER PICTURE

**JEREMY BRIM**





Performance measurement and management in the bidding phase has always been challenging, with so much of what defines success in winning work taking place upstream or out of control of the bid function. And there has always been the old argument of what matters in measurement, e.g., win rates based on volume versus value, etc.

What's more, decent measurement has often been inhibited by:

- Poor quality, short-term pipeline data with limited selection of opportunities for pursuit and positioning in advance of tender
- Sales teams chucking opportunities over the fence last minute, with limited engagement of the bid team
- Recession and employment market resource constraints driving leadership confidence and behaviour
- An overpopulated and chaotic framework market, leading to ineffective bidding activity

Where we are working with clients to design their operating models and processes for growth, we encourage them to take a more holistic view - looking to see the bigger picture when it comes to their return on investment in winning work. We tend to follow this approach:

- Beginning by undertaking a growth maturity modelling exercise, to benchmark the maturity of the business against industry high-performance and best practice, as well as a review against the business development maturity life-cycle model. This provides both a measure in itself that can be retested annually, but also clear pathways to improvement and measurement moving forwards in the detail

- Developing an organisational change piece, with a new operating model and set of work winning processes - with measurement baked into the heart of it all, aligned with the success factors outlined in the business plan

- The operating model clearly earmarks roles and responsibilities for anyone with accountability for growth and their personal measures of success. We bake in a twin-track approach to personal performance measurement, with strategically everyone measured on the overall margin of the business, and tactically on what each individual does to support its achievement. This means the whole organisation is aligned in its pursuit of growth and quality of earnings (not just turnover), with minimal wasted effort and maximised return on investment

- Advocating one 'single version of the truth' pipeline data repository - whether that is a sophisticated CRM platform, a more basic SharePoint database, or even just one big spreadsheet. For example:

- We recommend measurement of the input of timely quality data to the pipeline by those accountable be considered at annual appraisals of personal performance (with penalties for lack of action and rewards for timely good quality data)
- We suggest segmenting pipeline data by whether the opportunities are with existing key clients, prospects highlighted in the business plan or wildcards and if the opportunity has been captured or not positioned for (in B2B or B2G markets, existing key clients provide as much as 80% of turnover, with high levels of negotiation and high win rates). Other pipeline data can also be segmented e.g., if the opportunity

is via negotiation, is for a framework itself, a framework direct award submission, framework competitive mini-bids, or open market bidding

- We track all leads, including no-bids and why they were deselected to look for trends
- Implementing the use of data and analytics tools, such as Power BI, for the interrogation of data and analysis of trends. We deploy the tools on the classic measures of volume and value of pipeline per phase of pursuit through the deal funnel and win rates based on volumes and values etc. But we also use the tools to analyse input indicators. These include the time between when a lead was inputted into the pipeline and a bid outcome and compliance with bid process key steps and gateways (such as was storyboarding appropriately undertaken and reviews of content held)
- Drive for client feedback on every proposal or bid, ideally face to face, with a simple net promoter based scorecard for clients to complete to provide insights on ways to improve
- Attempting to undertake feedback surveys of bid team members and lessons learned reviews on every bid, looking for feedback on trends. These help to determine if the bid process needs updating or if people in the business need development as well as substitution and client or market-driven trends

Sure we measure the small stuff, getting into the detail of win rates per segment and type of deal or bid, and leverage data incrementally to improve. But by being aligned top to bottom and focused together as one growth-generating function, margin is above all else.



# UNVEILING

# SUCCESS

**MICHAEL  
BROWN**

## **IN BIDDING: BEYOND WIN RATES AND THE ROI DILEMMA**

**WELCOME TO THE CAPTIVATING WORLD OF BIDDING WHERE SUCCESS IS A MULTI-FACETED JOURNEY. IT GOES BEYOND SIMPLE WIN RATES AND CHALLENGES THE TRADITIONAL NOTION OF RETURN ON INVESTMENT (ROI). THIS ARTICLE WILL EXPLORE THE KEY FACTORS THAT TRULY DEFINE SUCCESS IN THE BIDDING SECTOR WHILE ACKNOWLEDGING THE COMPLEXITIES SURROUNDING ROI AS A USEFUL METRIC. GET READY FOR AN ENLIGHTENING EXPLORATION OF THE DIVERSE ASPECTS THAT SHAPE TRIUMPH IN THE BIDDING LANDSCAPE!**

**““””**

**BIDDING SUCCESS EXTENDS BEYOND WIN RATES, CHALLENGING THE CONVENTIONAL USE OF ROI AS A SINGULAR METRIC.**





### **Meeting Deadlines with Flawless Precision**

Meeting deadlines is paramount in the competitive realm of bidding. As bidding professionals, we understand the thrill of delivering proposals on time, showcasing our reliability and professionalism. The ability to consistently meet deadlines sets the stage for success, demonstrating a reliable, organised and efficient bid team.



### **CRM: Your Trusted Partner in the Bidding Journey: Bridging the Gap Between Bid Teams and Sales**

As seasoned bidding professionals, we recognise the pivotal role of Customer Relationship Management (CRM) systems. These invaluable tools are typically used by sales teams to manage client relationships and track sales activities. However, it is crucial to highlight the importance of bid teams' influence and involvement in CRM use to ensure a seamless bidding journey.

While bid teams may not be directly responsible for maintaining CRMs, their collaboration with sales teams is essential. Bid teams can contribute valuable insights and information specific to the bidding process by actively participating in CRM use, reporting and tracking. This bridges the gap between bid teams and sales, allowing bid professionals to stay informed about client interactions, project updates, and evolving requirements. As a result, bid teams can align their strategies and proposals more effectively. Owning their part of the sales process enhances their chances of success.



### **Organised Bid Folders and Bidding Collateral Databases: Fuelling Efficiency and Impact**

Bid folders and bidding collateral databases work hand in hand to fuel efficiency and create impactful bids. Meticulously organised bid folders provide quick access to essential documents, paving the way for seamless operations and persuasive proposals. Meanwhile, bidding collateral databases serve as treasure troves. They house templates, case studies, success stories, and visuals that elevate bids to new heights. When bid teams use these resources effectively, they can create compelling and tailored proposals that captivate clients regardless of the ROI complexities they may encounter.



### **The Art of Minimising Last Minute Bids: A Symphony of Technical and Bid Team Communication**

A crucial aspect of successful bidding lies in the seamless communication between technical teams and bid teams. The ability to collaborate effectively and ensure clear lines of communication is a measure of success in itself. Technical experts and bid professionals should work hand in hand to ensure a thorough understanding of project requirements and client expectations at an early stage. This minimises last-minute bids and ensures clear, consistent and powerful messaging. Fostering strong communication channels enables bid teams to navigate the bidding landscape with purpose and achieve better outcomes.



### **Team Cohesion: The Secret Sauce to Bidding Triumph**

Behind every successful bid lies a cohesive and satisfied bid team. Bidding professionals recognise the significance of cultivating a positive work environment that nurtures teamwork, growth, mutual support and a respectable work-life balance. Low turnover rates and team satisfaction are clear indicators of success and are the hallmarks of a motivated and high-performing bid team that consistently meets targets and exceeds expectations.

Bidding success extends beyond win rates, challenging the conventional use of ROI as a singular metric. Success is also measured by:

- **Meeting deadlines**
- **Actively bridging the gap between bid and sales teams (by participating in CRM use)**
- **Leveraging organised bid folders and bidding collateral databases**
- **Minimising last-minute bids through effective communication between technical and bid teams**
- **Fostering team cohesion**

By embracing these key aspects, bidding professionals can enhance their performance, increase their win rates and establish a reputation for excellence in the dynamic world of bidding.



# THE NEVER-ENDING JOURNEY TO SUCCESS

A woman with her hair in a bun, wearing a red dress, is seen from behind, looking out at a vibrant, colorful nebula in space. The scene is filled with stars and swirling clouds of gas in shades of blue, green, and orange. Two large, glowing blue and purple rings encircle the woman, creating a sense of depth and focus.

**I WANT TO TAKE YOU ON A MEANDERING LITTLE JOURNEY THROUGH THE LAST TWO AND A HALF YEARS. WHAT'S IN IT FOR YOU? WELL, IT SHOULD DEMONSTRATE THAT YOU DON'T HAVE TO GET IT RIGHT ALL THE TIME; YOU CAN LEARN, GROW, AND TAKE THE TEAM WITH YOU. AND THAT WHILE FORMAL PROCESSES ARE IMPORTANT, CULTURE IS CRITICAL.**

**PIPPA BIRCH**



Although Pipster is over 10 years old, it is a relatively new organisation having only taken on staff at the end of 2020. We are the epitome of a 'Learning Organisation'. It never stops. We are always trying to improve collaboratively, tweaking and changing processes as a team to ensure efficiency, as well as improve customer and individual satisfaction. Aside from the formality of developing process and policy, our supportive culture has deepened – we nurture performance and personal development, bringing staff on as a team and as individuals, providing opportunities for growth and celebrating success.

### **So good it hurts**

My support for individual personal development has been so good I've lost two important team members. One was headhunted for a new bid team in the City and one left to set up their own consultancy. I could take this as failure – losing people is never nice – but I actually see this as a positive. I've nurtured and supported them enough to give them the confidence to stretch for and achieve their personal dreams. And I wholeheartedly support them in their futures, even if we all miss them. Once a Pipster, always a Pipster.

So informally, we are getting it right. What we haven't done so well perhaps, is to formalise performance management and continual development – we have tried, but it has fallen short of the mark so far. This was evidenced by a recent employee engagement survey, where more than half of the staff said we weren't getting performance evaluation right. But we are on an improving journey, and will continue to adapt and ensure what we are doing is relevant and actionable for all individuals.



**I THINK THE MOST IMPORTANT THING IS TO CONTINUE TO FOSTER OUR COLLABORATIVE CULTURE OF APPROPRIATE FEEDBACK, SUPPORT, AND CELEBRATION.**

### **Success factors**

Way back at the beginning of the team, I created three success factors linked to customer satisfaction and process – was the bid submitted on time, was it completed to the required standard, and was the client satisfied? I wanted to have some sort of measurable for performance and this seemed like a simple way to understand that we had achieved what we had set out to do. But it wasn't enough, it didn't stretch anyone, and to be honest, it was more business as usual rather than performance measurement.

### **Formal procedures linked to bonus**

I knew I needed to do something that could be linked to a bonus each year, to give the team something to strive for, both personally and for the business. In fact, they all said they wanted something more formal. We decided on annual objectives linked to bonus with twice yearly line manager meetings. The bonuses were linked to one company target and three personal targets – all very personal and depending on where each individual is in their career and aspirations. These were set in May for the following financial year, with a six-month review and update. The team embraced it and off we went. Objectives included getting three lots of positive client feedback, attaining APMP Practitioner, and getting LinkedIn followers to 1000.

In hindsight, we ended up with activity-based targets, with nothing to challenge and no alignment with business success. Even the Personal Development Review process was managed ineffectively. I hold my hands up to that. We thought that positivity would breed success and didn't highlight any failings. But actually, I've learnt there should be difficult conversations if people aren't performing. They need to know they are not hitting the mark so they can improve. In life, I've always embraced failure as a stepping stone, and encourage others to do the same, but seemingly forgot about this when completing performance reviews. I thought the more positive I was, the more they would strive further. But I was wrong. It's funny, as we all write about performance monitoring in bids – I appeared not to take any of my twenty years of knowledge into account when developing my own company processes.

### **Supportive culture**

Key to individual success within Pipster is obviously not down to formal performance monitoring processes. What has worked has been the informal and consistent two-way feedback, through regular reviews, one-to-ones, team reviews, spontaneous chats and messages via WhatsApp, and the embracing, supportive culture of the Pipster team. We want each other and the business to succeed, and our clients to win. As a small community, we ensure each other feels valued and encouraged, enabling the growth that breeds great performance.

### **Training and a rethink**

We certainly have a lot to learn and several of us will be undertaking some focussed performance training soon. This will make sure any goals and objectives we are collaboratively setting are appropriate and challenge every individual to be a better version of themselves. I continue to be mentored and coached as a business owner and have had several conversations about setting the right business objectives and using those to create stretch targets and activities for each member of the team, linked to a personal development and training plan. I was interested to see OKRs (Objectives and Key Results) mentioned several times on LinkedIn, and this aligns with what I am wanting to try next. I just have to develop the plans properly and roll them out to the team – often difficult with the amount of bid work we have, where I'm having to work more in the business than on it. Frustrating.

As I sit here and write this, I know I haven't got it right yet. I am committed to developing and refining our formal performance management processes, and engaging in difficult conversations where necessary. However, I think the most important thing is to continue to foster our collaborative culture of appropriate feedback, support, and celebration. This will ensure we propel each Pipster, the business, and our clients towards continued success.

### **The Pipster journey continues...**





# NOT EVERYTHING IN WONDERLAND IS HEALTHY

HOLGER GARDEN

“““

“WOULD YOU TELL ME, PLEASE, WHICH WAY I OUGHT TO GO FROM HERE?”  
“THAT DEPENDS A GOOD DEAL ON WHERE YOU WANT TO GET TO,” SAID THE CAT.  
“I DON’T MUCH CARE WHERE—” SAID ALICE.  
“THEN IT DOESN’T MATTER WHICH WAY YOU GO,” SAID THE CAT.  
“—SO LONG AS I GET SOMEWHERE,” ALICE ADDED AS AN EXPLANATION.  
“OH, YOU’RE SURE TO DO THAT,” SAID THE CAT, “IF YOU ONLY WALK LONG ENOUGH.”





**FOR EFFECTIVE PERFORMANCE MANAGEMENT, IT'S IMPORTANT TO KNOW WHAT SUCCESS LOOKS LIKE: TO START WITH THE DESTINATION IN MIND SO WE CAN WORK AS A TEAM WITH AN EXPECTATION OF ACHIEVING SUB-GOALS AND, OF COURSE, THE END GOAL OF WINNING.**

It's my view that Lewis Carroll's *Alice's Adventures in Wonderland* is one of history's most charming and beautiful stories. In bidding, however, we must adopt neither Alice's nor the cat's approach.

For effective performance management, it's important to know what success looks like: to start with the destination in mind so we can work as a team with an expectation of achieving sub-goals and, of course, the end goal of winning.

A great question to ask ourselves is: "How will you know you've achieved [SUB-GOAL]?" That question always sparks deeper thought about process and actions. The sub-goals are best defined with all elements of SMART, but they're no less important if that's not the case. Some examples:

- Desired outcomes from a meeting (e.g., actions and allocated owners, with deadlines)
- Level of detail to enable a meaningful writing plan review
- Layout and design of a page of technical material to ensure easy 'digestion' for the reader

These can flex to suit circumstances, but knowing what we want from them means we're working towards a performance destination. Unlike Alice and the cat, we don't have the time, resources or energy to chase uncertainty.

I consider my early conversations on a new bid to be successful for my client and me if we've clarified:

- The client's 'big picture': why they're bidding and how the bid fits into their and the end client's business strategies
- What I'm expected to do (write, edit, review, or a combination)
- By when (including interim deliverables)
- For whom (there are usually multiple stakeholders in my client's team)
- With whom (there are usually multiple subject matter experts (SMEs))
- My plan for achieving the requirements, even if just an outline initially

I often need to write about my clients' performance management systems, which exist as mechanisms to mitigate the risks of sub-optimal delivery in terms of quality, skills, achieving programme milestones, and various other factors. As bid professionals, we can view our own performance management in terms of risk mitigation. For example, when developing bid responses we must mitigate risks including:

- Seeking SMEs' inputs too late, leaving SMEs unclear about what we need from them, and not gaining the most from SMEs' expertise in each conversation
- Not having responses ready for review milestones

- Writing less concisely and clearly than possible
- Not answering every element of a question
- Omitting aspects of the proposal strategy's win themes
- Not addressing the end client's and stakeholders' critical success factors
- Not adhering to response format instructions

Taking the first of those as an example, response planning requires SMEs' inputs to help develop the writing plans with the benefit of the SMEs' expertise. By structuring the response outline (headings and initial key points) before involving SMEs in detailed response planning, we (writers) help them to help us because we don't approach them with a blank page. The outline serves as an aide-memoire to help show where we need specialist expertise and to guide thinking about technical aspects and case examples. It also enables SMEs to tell us what they think is missing. By transferring actions to the writing plans from the kick-off meeting, and from even earlier in the bid cycle if relevant, we avoid forgetting to discuss important ideas in detail with SMEs. These aspects of preparation are to make SME meetings more time-efficient – a sign of improved performance when engaging the support of already-busy people. SMEs have told me over the years that a key performance indicator for them is to be engaged for each bid on as few occasions as possible. I don't interpret that remark as a sign of apathy, but instead as the need to make best use of time, our most important commodity.

By understanding performance expectations and how to mitigate the risks of not meeting them – or, even better, identifying how to exceed them – we're able to monitor progress, receive and provide feedback, and identify areas for our own and others' improvement in the bid and for future bids. The continuous improvement loop is essential because we cohabit the bid environment and our performance depends on our shared (and accurate) understanding of the conditions for success.

As Stephen Covey, author of *The 7 Habits of Highly Effective People*, said:

"Almost all of the world-class athletes and other peak performers are visualisers. They see it, they feel it, they experience it before they actually do it. They begin with the end in mind."

That's what we do in bids when we plan how to show the end client why they need to appoint us. It's our way of making sure we don't fall with Alice into the rabbit hole.



# WINNING - BUT AT WHAT COST?

**ANNA  
MAYSEY-WELLS**





Performance management and measuring success have both been discussed at length across the bidding industry. To no one's surprise, it is hugely subjective. For example, a Pipster Solutions #BidBites session in early 2022 focused on win rates and how different firms/leaders tracked their wins. By the end of the hour we had many examples and opportunities for how to measure bidding success but no agreed singular approach to best practice. Plus ça change – 'twas ever thus!

The measure of success for senior management teams who are not involved in bids in any tangible sense often boils down to "What's our win rate?" – possibly plucking an arbitrary percentage out of the air for bid teams to aim above. (FYI, Loopio's annual trends report provides market comparisons on win rates which is helpful for those conversations should you need it). Revenue targets may motivate teams (as they have a clear goal in mind) but are also somewhat futile. More often than not the revenue gained from a winning bid is determined by the fee or client spend – in other words, it's only worth what someone is willing to pay for it! Bid KPIs or targets are also best avoided. In professional services, the business stakeholders are our client and they have final say on the bid. If they choose to ignore the bid team's expert advice, there is an argument the team should not be penalised if those bids lose.



**I MANAGE PERFORMANCE BY ENSURING MY TEAM MEMBERS ARE MENTALLY ROBUST AND HEALTHY, THEY ARE NOT BURNING OUT AND THEY FEEL SUPPORTED IN SAYING, "NO, I WON'T BE ABLE TO DO THAT FOR YOU TONIGHT" TO STAKEHOLDERS WHO MAKE REQUESTS AT 5:29PM ON A FRIDAY. ARE THE WORKLOADS BALANCED? DOES THE TEAM FEEL SUPPORTED BY EACH OTHER AND BY ME? DO WE ALL HAVE EACH OTHER'S BACKS? IF WE CAN ANSWER "YES" TO ALL THOSE QUESTIONS THEN, TO ME, THAT IS A SUCCESS.**

Despite all this, measuring success is often not win or lose but whether myriad other considerations have been taken into account. What about conversion rates? What about developing new content? What about a low win rate but an absolutely stonking ROI? What if you won the bid but your team are getting signed off for exhaustion one by one?

Perhaps a better way to measure success is assess it more holistically rather than purely using metrics. This is where performance management comes in. In the legal industry, the bids team does not receive commission or incentives if a bid wins. There are no client dinners or awards for a job well done. Bonuses are not linked to targets (in my experience) as we do not have sales managers.

Instead I manage performance by ensuring my team members are mentally robust and healthy, they are not burning out and they feel supported in saying, "No, I won't be able to do that for you tonight" to stakeholders who make requests at 5:29pm on a Friday. Are the workloads balanced? Does the team feel supported by each other and by me? Do we all have each other's backs? If we can answer "Yes" to all those questions then, to me, that is a success – and it's not easy to achieve in the bidding industry, as any of the BQ16 contributors will attest! To manage performance this way means my team achieves success in other areas (stakeholders telling them they value their advice, for example) without attaching a data-driven value to it.

Is it exciting and uplifting when we win? Yes, absolutely. There is no question that, for a bidding professional, a call or email starting with "We're pleased to inform you..." gives a buzz like no other (particularly if it was one of the more onerous RFPs!). But the team is also excited and uplifted when we get through to interview stage, or when we've finally cracked the wording on a particularly difficult piece of text, or when the sales team comes through with some really useful capture information. Taking pleasure and encouraging pride in the less tangible or obvious wins is key to ensuring the ongoing high performance of the team. It also helps soften the blow of any losses.

The bidding industry has a high burnout rate and often diminishing job satisfaction the longer one is in the profession. This is why performance management and measuring success should not have the same criteria for the bid as for the bidder. It is fundamentally necessary to differentiate what success look like between the two and to find the wins where one can – both personally and professionally.





# AGILE GRAPHIC DEVELOPMENT

Change is inevitable in our industry and it's happening faster than ever. Agile methodologies are how businesses navigate rapidly evolving landscapes and mitigate brittle, anxious, nonlinear, and incomprehensible environments. Companies across a spectrum of industries have successfully applied an Agile methodology process to everything from software development to project management.

So, why not use Agile methodologies when creating proposals?

Since the proposal industry is constantly in flux, I believed applying Agile best practices would benefit our processes. To test my theory, I reviewed proposal graphic development as this process is a stumbling block for most organisations.

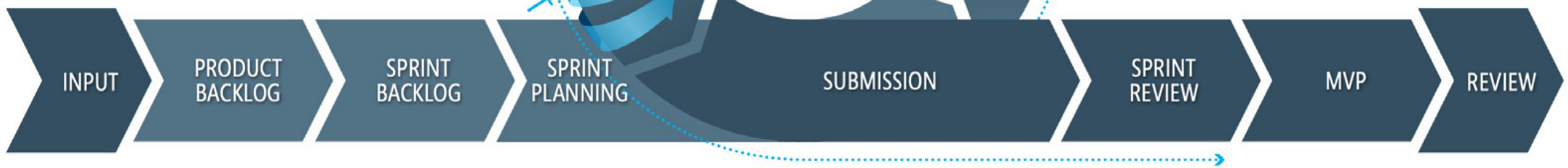
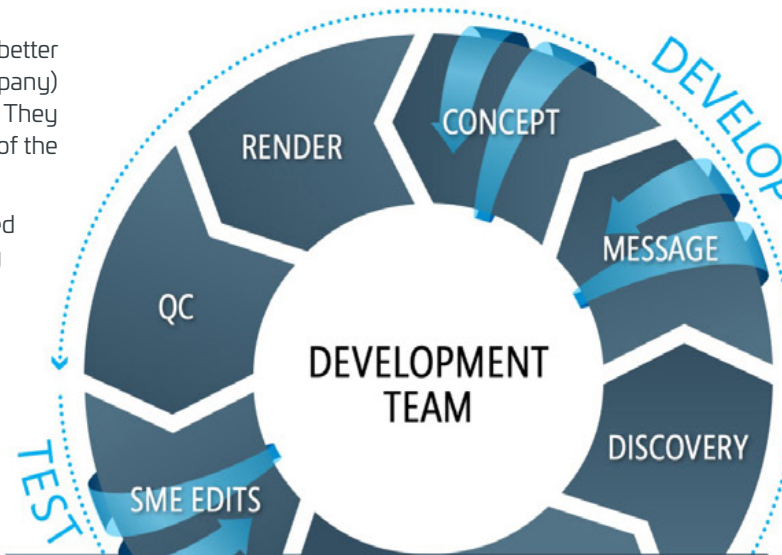
Two of the eight Agile methodologies I reviewed aligned better with the best practices of my organisation (24 Hour Company) developed through trial and error over the last 30 years. They were Kanban and SCRUM (though SCRUMBAN, a hybrid of the two, also worked very well).

The SCRUM-based Agile approach is ubiquitous. I aligned it with graphic development and the result was incredibly efficient and flexible. SCRUM is essentially a pre-defined process called "sprints". It is executed again and again to deliver a "final" graphic at each sprint (not all of which were different).

There are three key roles for this approach:

1. **Product Owner – Equivalent to the Capture or Sales Manager.**
2. **Scrum Master – Equivalent to the Proposal Manager.**
3. **Development Team – For our purposes, this included Solution Architect(s), Designer(s), and Authors/SMEs/Reviewers.**

Each sprint comprises 13 steps. The following graphic is an overview of one sprint.



### Step 1: Product Backlog

The Capture Manager (Product Owner) defines the scope of work and communicates the needs, value, scope, and prioritisation to the team. They may coordinate with the Proposal Manager (Scrum Master) and Development Team.

### Step 2: Sprint Backlog

The Proposal Manager (Scrum Master) discusses user stories (i.e., describe what is communicated in each graphic) and estimates the level of effort. Then they "groom" the Backlog, which means they choose and prioritise the visuals ready for the Development Team to log the chosen visuals.

### Step 3: Sprint Planning

The Proposal Manager (Scrum Master) reviews the requirements and value of each visual with the Development Team. Next, they share relevant documents, review the timeline, discuss any potential barriers and define graphic template needs. The template must be created by the Development Team and approved prior to the first sprint.



### Step 4: Discovery

The Development Team reviews documents and solution content, identifies gaps, and asks SMEs and the Capture Manager questions to fill the gaps. The information is organised and evolved until complete.

### Step 5: Message

The Development Team then writes the message (i.e., action caption) for each graphic. The message succinctly summarises the value of the graphic's content. For example, your message may read, "Resolve 99.9% of Trouble Tickets within 6.2 hours of creation using New Tech's customised Help Desk solution."

### Step 6: Concept

The Development Team conceptualises each graphic using basic tools like a pencil and paper, an app, or their tablet. Before conceptualising, they first 'chunk' the content by highlighting the most important elements found during the Discovery step. Next, they sketch or mock-up visual ways to represent that information. I use my Graphic Cheat Sheet, Build-a-Graphic software, or search the web for ideas. The concept is the "Minimum Viable Product."

### Step 7: Render

Once they receive approval for the sketch or mock up, the Development Team renders the graphic in an agreed style (design or an existing template if needed) using the Adobe Suite, PowerPoint, or an add-in like Build-a-Graphic (as in the example below).

### Step 8: Quality Control

The Development Team reviews and edits the graphic for compliance, grammatical errors, inadvertent omissions (or additions) and aesthetics.

### Step 9: SME Edits

The SME and Proposal Manager review the graphic to ensure:

1. Content is accurate.
2. All gaps are filled or can be filled.
3. Up-to-date data is included.
4. Graphic communicates what it needs to say to the evaluator.

### Step 10: Submission

The Development Team submits all completed graphics for placement in a reviewable document.

### Step 11: Sprint Review

The Proposal Manager leads a formal graphic review process. They note needed changes for the next sprint.

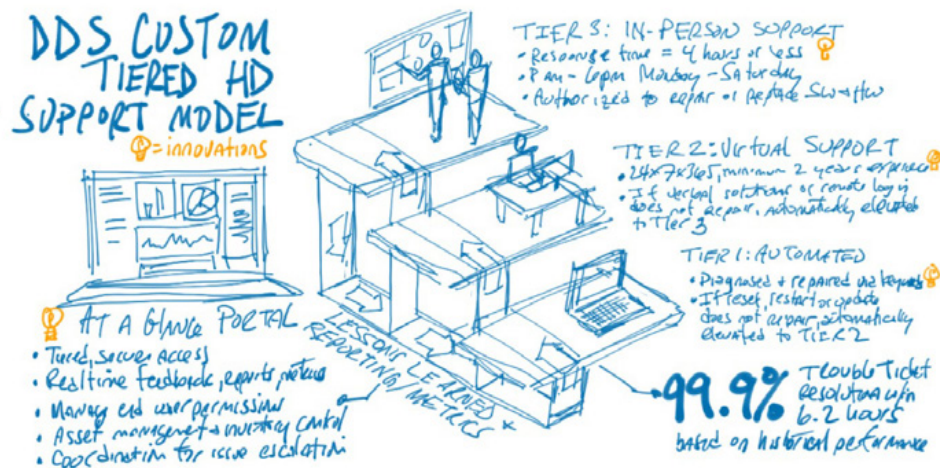
### Step 12: Maximum Value Product

The Proposal and Capture Managers gather and analyse reviewer feedback. The Development Team corrects the graphics if needed. Your goal is to ensure the graphic is as mature as possible and evolves with the proposal. Once completed, the graphic is deemed the Maximum Value Product. This means that it is the greatest level of maturity and the highest quality graphic we can submit at the time

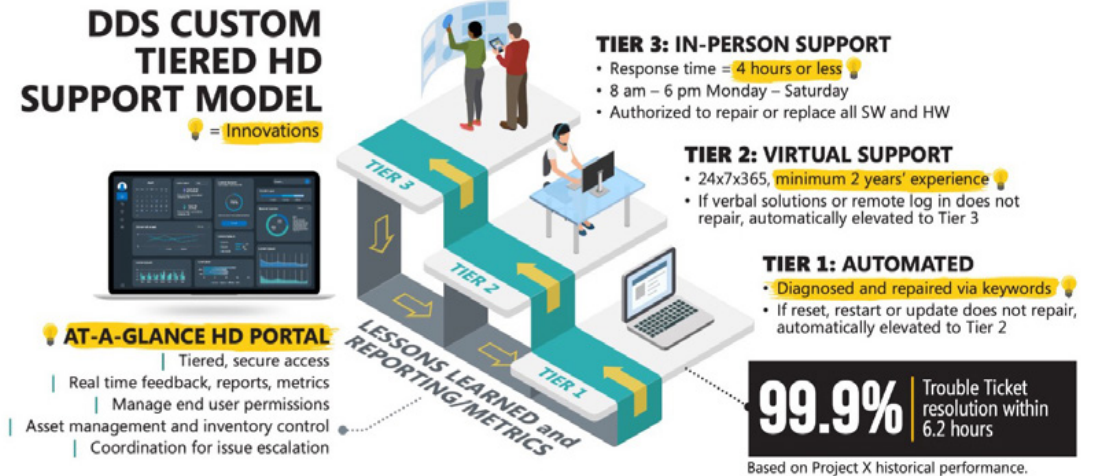
### Step 13: Review

The Proposal Manager coordinates a 'Sprint Retrospective' to review the process, feedback, and deliverables to identify areas for improvement. They work with the Development Team and Capture Manager to implement any recommended changes to their workflow before the next project. Once complete, they move to the next sprint.

An Agile approach (like the one for graphics demonstrated here) helps the entire team deliver the highest quality work in a rapidly changing environment.



Concept



Render



LARISSA CORNELIUS

# MEASURING TO WIN - OR JUST MEASURING YOUR WINS?



Measuring and reporting on an organisation's bid and proposal function is crucial to improving your win rate - but if you are only looking at your win rate you may be missing a beat.

Reporting and measuring the return on investment of your proposal function and the performance of your team is important to:

#### **Manage the function**

You cannot manage what you can't measure. Therefore, it is essential to have performance indicators to measure the effectiveness of the bid and proposal function.

#### **Building a winning culture**

Building a high-performing team requires vital performance indicators, and win rate is not one of them. Instead, driving the right behaviours will result in increased wins.

#### **Gain buy-in and investment**

One of the most significant complaints from the proposal industry is a lack of buy-in or respect for the proposal function. In my view, a big reason for this is that the proposal function has not effectively sold the value proposition to the business. The best way to do this is with statistics.



## WHERE DO YOU START?

- **Benchmark against industry standards and best practices.** To get meaningful insights, perform a thorough benchmarking exercise. Pair this with an independent review of your overall process, response samples, team structure, client feedback, the organisation's sales objectives, and stakeholder expectations to get a great benchmark
- **Understand and report on the cost of your bid or proposal function.** Every bid you respond to costs money. And every bid you pass up saves you money
- **Drive the return on investment.** You do this by dividing the cost of the function by the value of money it brings in
- **Measure the win rate and all it entails.** Companies should track key metrics such as win rate, proposal volume, cost of the function, team performance and return on investment to effectively measure the bid and proposal function's overall performance. However, one should also consider the aspects that impact the win rate, such as industry dynamics, strategy, pre-sales activity, price, and the competitive landscape, particularly competition strategies
- **Key performance indicators for a high-performing team.** Building a high-performing team requires performance indicators, and win rate is not one of them. Instead, driving and measuring the right behaviours will result in increased wins
- **Consider the big picture.** The bid or proposal process is part of the overall business development process and should be measured as such. Collaboration with teams in the organisation, such as finance, legal, and technical/subject matter expert teams, is crucial

## MEASURING RETURN ON INVESTMENT

This sample report data illustrates the importance of tracking key metrics in measuring the success of a bid and proposal function.

<b>Win rate (current Quarter)</b>	60%
<b>Win rate (previous Quarter)</b>	45%
<b>Proposal volume (current Quarter)</b>	50
<b>Proposal volume (previous Quarter)</b>	45
<b>Cost of function</b>	£100,000
<b>Revenue value of proposals/tenders won</b>	£600,000
<b>Return on investment</b>	£500,000

The table (below left) confirms the bid and proposal function has a 60% win rate – a significant improvement from the previous quarter's win rate of 45%. The proposal volume is also up by 10% from the previous quarter, indicating increased business opportunities.

However, the cost of the function is quite high at £100,000 which may require further review and optimisation. The return on investment is £500,000, indicating the bid and proposal function generates a positive return for the company.

## IMPROVE TEAM PERFORMANCE BY DRIVING INDIVIDUAL METRICS

It is important to focus on building the right culture when measuring the performance of individuals in a proposal team. This can be achieved by driving the right behaviours that lead to increased wins.

Measuring team performance should be based on the drivers necessary to build a winning culture, which may differ from team to team. The "Ok to Awesome" program I created with Izane Cloete-Hamilton is one way to measure team performance. This program includes measurements of team performance and core strategic values of the business, including proposal best practice knowledge (using training, self-study and testing), adherence to the proposal process (via audit trail), 360-degree reviews (from peers in the proposal office and other business functions), management review (self and manager review) and innovation (approved innovations brought into the process, team, etc.).

In the following example, the proposal team demonstrates strong knowledge with a 90% score for proposal best practice knowledge. The team also has a high adherence rate of 95%, indicating that they follow the proposal process closely. The 360-degree reviews received an average score of 98%, indicating the team is well-respected by their peers in the proposal office and other business functions. The management and individual review received an average score of 90%, indicating that the individual is meeting expectations set by their manager and themselves. Finally, the individual has successfully implemented five approved innovations, indicating a culture of continuous improvement and innovation.

<b>Proposal best practice knowledge (Compulsory tests and self-study)</b>	90%
<b>Adherence to the proposal process</b>	95%
<b>360-degree reviews average</b>	98%
<b>Average Management &amp; Individual Review</b>	90%
<b>Approved innovations implemented</b>	5

It is important to note win rate should only be measured at team level, not as an individual target. By driving a winning culture through the right behaviours, wins become an outcome.

In the following table, the proposal or bid function has submitted 50 bids, with a win rate of 60%. The average deal size is £100,000, and the conversion rate is 75%. These metrics provide a comprehensive view of the function's performance and can help identify areas for improvement.

<b>Number of bids submitted</b>	50
<b>Win rate</b>	60%
<b>Average deal size</b>	£100,000
<b>Conversion rate</b>	75%

Building the right culture is crucial to the success of a proposal team. It involves creating an environment where individuals are motivated to work towards a common goal and are empowered to take ownership of their work. This can be achieved by providing training and development opportunities, recognising and rewarding good performance, and fostering a collaborative and supportive team environment. When individuals feel valued and supported, they are more likely to be engaged and committed to delivering high quality work – ultimately leading to increased wins for the team.

Investing in a proposal function will drive increased wins resulting in business growth, job creation, and retention. By measuring and reporting on the bid and proposal function's performance, companies can identify areas of improvement and develop a more effective strategy that considers the unique characteristics of their industry and competition.



**JOHN F KENNEDY ONCE SAID, "SUCCESS HAS MANY FATHERS, BUT FAILURE IS AN ORPHAN." THE HISTORIAN TACITUS PROVIDED AN EARLIER VERSION OF THIS SENTIMENT WITH, "THIS IS THE UNFAIR THING ABOUT WAR: VICTORY IS CLAIMED BY ALL, FAILURE TO ONE ALONE."**

# MEASURING SUCCESS

LESSONS  
LEARNED

**CHRIS WHYATT**

**"SUCCESS HAS  
MANY FATHERS..."**





**UNDERSTANDING  
WHY WE EITHER  
WON OR LOST IS  
ESSENTIAL AS PART  
OF PERFORMANCE  
MANAGEMENT,  
MEASURING  
SUCCESS, AND  
CONTINUAL  
IMPROVEMENT.**

Both ring true in the world of sales and bids. Victory or failure offer our world the best opportunity we will ever have to improve; to measure success; to manage performance; to apply the lessons learned. Sadly, this rarely happens.

I've worked with about twenty organisations to help them create either opportunity management frameworks or bid management frameworks. The starting point is always a blank whiteboard or flipchart (remember them?), and a room full of key stakeholders who want to win more business.

As the 'external facilitator' for the design workshop of the intended framework, I emphasised my independent role, but added that, in my opinion, the last stage of the framework should always be 'lessons learned'. This was often questioned by the workshop attendees, so I'd make the point that understanding why we either won OR lost is essential as part of performance management, measuring success, and continual improvement.

I'd also point out that professional sport does this, to great effect, and have done so for decades. Professional golfers go to the practice ground after each round of a tournament, regardless of the outcome to analyse their swing and the shots it produced or failed to produce. Major football clubs all have rooms at training grounds where they watch and analyse their last match, prior to watching the current form of their next opponents, using this to define their win strategy and pick the best possible team. Boxing is just the same, as are most sports, so why not sales and bid pursuits?

Let me give you an example from my long career. When ComputerLand (CL) won the Manchester City Council Managed Desktop Services contract against the likes of Computacenter and SCC (the incumbents), I offered to do the customer debrief, arguing that MCC would be more open with me (an independent) than with a CL employee (and I was right).

In these scenarios, I ask two simple questions:

- 1. What did we (in this case CL) do well?**
- 2. What could we have done better?**

The MCC response was invaluable. The buying team (or DMU) was made up of about ten people, of which only one was a woman, which I found interesting (but this was early 2000s). After some discussion but no real conclusions, the woman said that she chose CL because, "the proposal felt like it was written for us." How powerful is that? This then triggered a

longer discussion about the good points in the proposal, all of which were highly customer focused. They went on to comment that CL were the only bidder who stuck to the 30 slides maximum for the presentation, and waxed lyrical about the fact that the first 27 CL slides spoke only of the MCC requirement and the CL solution, with the LAST 3 slides being about CL. And there was more, but nothing negative at any point. No reference was made to other bidders.

So there were some obvious lessons there from a Measuring Success point of view. My advice to CL was simple: lock the MCC proposal in a vault and don't let anyone cannibalise an electronic copy.

I've conducted many independent win/loss reviews on behalf of clients. I have never been refused an audience which, I believe, is because the two simple questions I propose are very non-threatening.

The loss reviews offer equally valuable lessons, as well as some great comedy moments. Examples include the salesperson who complained about his hangover during the final pitch, the failure to spell key stakeholder names correctly in both the proposal and the pitch, the use of the wrong company name (NatWest when bidding into Barclays), late delivery of the proposal (24 hours) when key stakeholders had cancelled leave to review all the responses. The very worst response (received several times) was failure to understand the customer's requirement! I doubt any of these facts would have been uncovered or shared by the sales lead on these deals if the debrief had been left to them!

In summary, I would advise the following if you want to measure success and improve performance management in bid and sales:

- 1. Always include mandatory win/loss reviews for all pursuits.**
- 2. Rigorously insist that all win/loss data is captured in your CRM system.**
- 3. Analyse this data to death!**
- 4. Make the first agenda item in EVERY pipeline review a discussion about EVERY win/loss since the last meeting.**
- 5. Apply the lessons learned on a continual basis.**

One final point: the opportunity and bid management frameworks I mention above were all on a single page and were displayed in poster form everywhere sales and bid people went about their business.





“

IN  
GOD WE  
TRUST

# ALL OTHERS BRING DATA

”

Our industry lends itself to measures of performance. Success and failure. Win and loss. There isn't much in between. But what else should we track beyond the traditional, rearview measures for the quarterly report if we want to build a solid platform for bidding success?

Bidding is primarily a people and knowledge business. Two organisations with near identical capabilities can have wildly differing results just because of how their people perform.

Daniel H. Pink's research<sup>®</sup> tells us Autonomy, Mastery and Purpose are the three key motivators driving people performing work requiring a modest level of cognitive skill:



**PAUL DEIGHTON**



### Autonomy

Once given a problem, people like to have control over the direction of their work and how they set about finding solutions and creating output.

### Mastery

People enjoy doing things well, and getting better at what they do with opportunities to grow and develop.

### Purpose

People like to feel their work has a point and can provide wider social value, so they will invest more energy in tasks that they consider worthwhile.



The same research found that once people in cognitive, creative jobs feel like their financial compensation meets their expectations and needs, additional pay incentives do little to drive performance.

In fact, where creativity was required and multiple solutions were possible, such incentives had the effect of narrowing thinking, potentially closing out other, possibly better solutions.

Apart from not relying on performance pay incentives, what is the implication of these findings for the bidding industry?

**Autonomy: be clear on the objective, then get out of the way**

You have employed smart Bid Managers and Bid Writers, so let them get on and do their job. If you try to tell them how to do something that you haven't done yourself for five years, don't expect a great result. Give them the tools and the training to know what a winning bid looks like, and they will recognise high quality when they see it and demand it where it is missing.

Gene Kranz is a retired NASA Flight Director (portrayed by Ed Harris in the film *Apollo 13*). His best known quote is, "Failure is not an option". He once related a story about having overruled a junior Flight Controller during a training simulation preceding live space missions. It became obvious in the debriefs that Kranz's decision during a live mission would have killed the astronauts. From this he learned a valuable lesson about not doing someone's job for them.

Senior leadership on a bid should be tracked in early direction setting which will reduce red team comments in the final stages. If you only bring them in at the end of the project, they will meddle. Set the direction and let the team do their job.

**Mastery: provide opportunities to learn and grow in bidding**

Mastery and expertise requires continual learning and growth. One path to growth is exposing the team to new situations (and new problems and new people). This could be working on a bid in a new sector, or on their first international bid, or perhaps with a new

partner. As we create the conditions for growth, it's also important to provide a safety net. We all need a little latitude to mess up without it denting our confidence forever.

Recognise we all have different learning styles and comfort zones, and may learn at a different pace (which can be highlighted using psychometric profiling tools). Identify mentors to help people to establish their own internal networks and enhance different aspects of their development. Who should they work with to improve presentation skills, write better summaries or answer questions concisely? Ask yourself how often you are providing development opportunities to your team. Could someone else lead that meeting, or present to that customer?

Provide learning and growth opportunities by allocating a development budget for each member of the team and track their progress. Measure their talents and motivations through personality trait testing (for new and existing employees alike).

**Purpose: show the real impact of winning the bid**

Did you hear the story of the two contractors who were each building an identical length of wall? Both were similarly skilled and experienced but one was working much faster than the other. When the first was asked what he was doing, he said he was building a wall. The second said he was helping to save lives by building a new fire station.

Tell the team what winning the bid will do for your organisation, the client, and (if it's a public sector bid) about the impact on the wider community. This puts "winning" into a larger, more meaningful context than simply a win-loss tally at the end of the quarter.

More than ever, the platform for measurable success in our industry is a sustainable, intrinsically motivated team, preparing winning bids in regular working hours. If everything else is in decent shape, then the monthly report might just take care of itself.

Encourage and track your team's engagement with the end customer so they will recognise and understand the full impact of their work if your bid is successful.

<sup>1</sup> Pink, D H (2011) *Drive: The surprising truth about what motivates us*, Canongate, Edinburgh





# ABOUT OUR EXPERTS



## Sarah Hinchliffe

Sarah labels herself a 'Storyteller, Organiser, Timekeeper' – three things that come naturally to her. After a 30-year sales career in the IT industry, where she learnt every popular sales methodology and sold millions of pounds of software and services, Sarah decided to share what she'd learnt about winning business using great stories, a systematic approach and consistently delivering on time. She continues learning and sharing through her freelance consulting work and volunteering as a writer, speaker and mentor.



## Mike Reader

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



## Nigel Hudson

Nigel is passionate about professional development. He designed and delivered the APMP award-winning Bid Academy for Vodafone and co-authored Europe's leading proposal syllabus with Strategic Proposals. He's trained more than 4,000 people worldwide.



## Graham Ablett

Graham Ablett is a Consulting Director at Strategic Proposals, where he helps clients to win specific opportunities as well as implementing effective and efficient proposal processes. He is a former board member of APMP in the UK, holding APMP Professional status, and is an APMP Approved Trainer.



## 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.



# 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.



**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.



**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.



**Lorraine Baird**

Lorraine specialises in helping organisations to win - evidenced by her personal win rate of over 85%. She's recognised for equipping bid teams with the right skills and tools to produce winning proposals and pitches for their organisations. Formerly heading up the bid team at Aviva, Lorraine's career in sales and bidding spans over 20 years. Lorraine is qualified at the highest level of certification in the profession - APMP Professional - and also recently attained the new APMP Capture Practitioner certification.



**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](http://jescartin.com), and manages proposals for worldwide technology companies as a consultant.



# ABOUT OUR EXPERTS



## Kat Wyon

Kat is the Research Director for Strategic Proposals. Having set up bid teams and worked across Telecomms, IT, Financial Services and Service Management, she is experienced in the world of sales and bidding across multiple sectors.

Kat has successfully defined and implemented best practice processes whilst being responsible for recruitment, management and motivation of staff within bid teams. She has driven the transformation of teams with the ability to create a mission statement for the team and strategically deliver against that mission.



## 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.



## 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.



## 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.



## Holger Garden

Holger is a bid manager and writer, and a personal/team performance coach. He spends most of his time supporting construction clients bidding for civil infrastructure and building projects, but his transferable skills have led to his work in the medical, charity and security arenas also.

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



# ABOUT OUR EXPERTS



## Anna Maysey-Wells

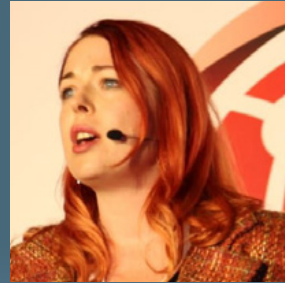
Anna is a Senior Bids & Operations Manager. She has been working in bids for nearly ten years following a brief stint in journalism and freelance copywriting. She now specialises in legal professional services and leads a team at a Top 25 European law firm.

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



## Mike Parkinson

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



## 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.



## Chris Whyatt

Chris is the co-founder of the UK APMP, prior to which he founded and led Practical Bid Solutions, and its successor, Get to Great Results. He has worked on major growth initiatives, sales and channel growth, sales turnarounds, must win deals, and sales and bid process improvement.



## Paul Deighton

Paul is the Strategic Services Director for Shipley UK and the Executive Director of the Business Winning Institute for Shipley US. He has 30+ years of experience in engineering, programme management, change management, and business winning. He co-authored the Capability Maturity Model® for Business Development and will be releasing version 3.0 in early 2024 focusing on "people". His consulting practice helps client organisations to transform and step-change how they win good business.



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