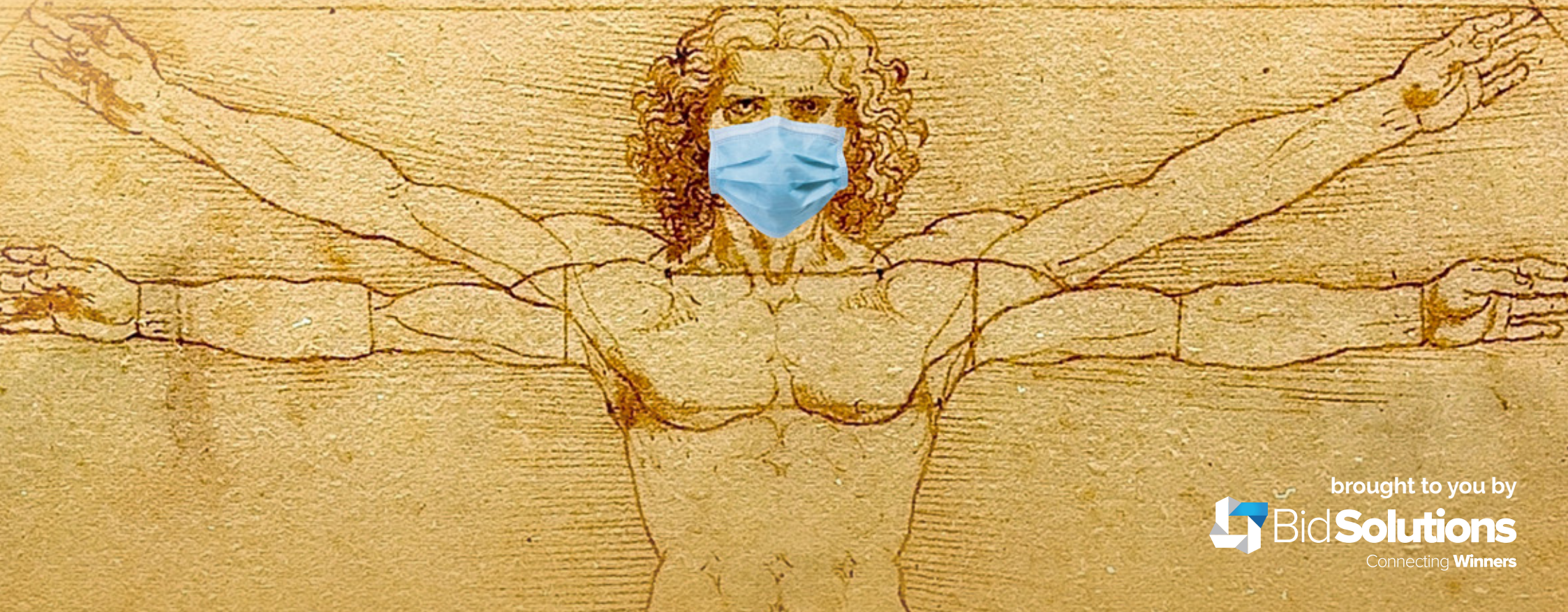


# BQ

BIDDING QUARTERLY

ISSUE #9  
SEPTEMBER 2020

## NECESSITY IS THE MOTHER OF INVENTION



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 **Bid Solutions**  
Connecting Winners

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**“Welcome to Bidding Quarterly, the thought leadership publication for the bid and proposal profession.” There, I’ve said it. I have hoisted aloft BQ’s colours for all to see and envy. And I did it proudly, in my first paragraph, as your guest editor.**

## FOREWORD

Ooh? A guest editor for Bidding Quarterly? Yes, it’s true. Martin asked me a while back if I’d like to edit the magazine, to weave a narrative through the contributions and connect the dots using the professional development lens for which I’m best known. There would be key learning points and practical tips to be highlighted, educational themes to identify and ‘sweet nuggets of truth’ to celebrate. And, given that this is a publication for bidding folk, I would be able to apply the “So what?” rule to ensure the publication delivers the value you seek. Yes, editing BQ would be my dream job. So why did it take me so long to accept Martin’s offer? Simple: there are labels attached to being an editor.

When he wasn’t writing some of the 20th century’s most critically acclaimed poems, famed writer and editor T.S. Eliot said, “Some editors are failed writers, but so are most writers.” I wondered what effect being BQ’s editor would have on my reputation for success. Eventually I agreed to the role knowing that, as a writer and editor in my spare time, I had a pretty good grasp of Ernest Hemingway’s advice: “The most essential gift for a good writer is a built-in, shockproof, shit detector.” Wise words for anyone working in proposals; I bet it’s an opinion shared by most procurement people, too.

I needn’t have had any concerns about editing BQ. As soon as I saw the articles submitted by our experts, I realised that they needed minimal or no correction and had been written in a way that highlighted their educational value. Bid and proposal people really do live, breathe and obsess about persuasive communication. The copy from our experts was crisp and the messages were clear. No wonder they’re such respected thought leaders.

There I go again. Thought leader. I really do mean it. Our BQ team are doing what they do best: sharing their knowledge, their discoveries, experiences, ideas, reflections and their learning, to help you to succeed. And they do it in an honest, down-to-earth and accessible way. This is not the Ego Express. It’s a thought leadership publication for your benefit.

In this edition, our experts have spoken honestly about how they’re adapting to more challenging times; how they’ve overcome adversity; how truth, empathy, simplicity and consistency are central to success; and how inventiveness can help us to see ‘better’ as we inch forward into an uncertain future. Subliminally they have addressed our desire to ‘survive and thrive’ during (and beyond) the restrictions of lockdown and the inevitable constraints of a recession, when ways of working and the definition of ‘workplace’ are changing. But it’s not all ‘restriction’ and ‘constraint’, however awkward or titillating that might be. As we know, change presents an opportunity for us to shape things for the better.

Talking of change, there are some exciting and radical developments coming in BQ10. But that’s three months away. For now, I’m proud to be the one holding aloft the last ‘single digit’ edition. It rebelliously defies the pressures placed upon us, including the dogmas and outdated processes that might otherwise constrain our ability to embrace fresh new ideas when they are most needed. That’s what thought leadership is about. It’s about inspiring actions that create positive change.

**NIGEL HUDSON**

# THE WORD

## SARAH HINCHLIFFE

**Since way before the E word - empathy - came into vogue, I have been wedded to the importance of a strong emotional connection in selling (see BQ8). People tend to buy from people they like and trust.**

Over the years, I developed my interest. I flirted with Aristotle's persuasive appeals, 'ethos, pathos and logos', which led to a more serious relationship with Roman Krznaric's book 'Empathy'. So, when I was invited (thank you APMP) to attend an Empathy workshop with Belinda Parma, I jumped at the chance. The bonus was meeting Martin Richards, an international hostage negotiator and crisis manager. Wow, how exciting.

Martin explained that his line of negotiation relies on building empathy. Empathy is the absolute basis of trust, and trust is the absolute basis of persuasion - whether persuading a suicidal person back to safety or Middle Eastern kidnapers to release their hostages. Without empathy and trust, the other party won't believe anything you say or do anything you ask.

As you might expect, hostage negotiation is traditionally spoken, although Martin said that text negotiations are becoming more common. Either way, the aim is to have a conversation. There can be long delays and silences, but a two-way exchange is crucial to a resolution. Empathy must be built and maintained all the way through.

Hostage negotiators use a range of skills to build empathy. Martin homed in on active listening, which I remembered from Krznaric's book. Active listening keeps you focused on the other party's agenda. It means picking up and responding to spoken cues - it shows you have heard and understood, it demonstrates you are interested, that you care and are intent on bringing the situation to a positive conclusion for everyone concerned.

A fascinating aspect of meeting Martin was learning that a seemingly specialised skillset is totally transferrable to our professional and personal lives. Martin teaches businesses and individuals, and volunteers for the crisis charity, Shout. We chatted about many aspects of transferability.

Thinking about negotiation skills in our world, it was easy to connect active listening with selling - conversation plays a huge part in generating the empathy needed to influence a buyer. But we also have to build and maintain empathy on the page. So I thought I'd have a go at mapping active listening skills into the written word. Being a lover of checklists (and good food), Martin's 'MORE PIES' was just the ticket - the table on page 5 shows eight active listening techniques, how they help generate empathy in a negotiation and ideas for proposal parallels.

Just as Martin inspired me, I hope my brief encounter with a hostage negotiator will inspire you.

1. Roman Krznaric, 'Empathy: Why it matters, and how to get it', published 2014 by The Random House Group Ltd
2. Belinda Parma, OBE, founder and CEO of 'The Empathy Business'
3. Martin Richards, former Chief Superintendent in the London Met Police, now freelance crisis and security consultant and author of 'Just when you think you are winning...Humorous tales of a hostage negotiator', published 2017. If you want to learn more, listen to this great interview: <https://www.likemindsevents.co.uk/hostage-negotiator-interview/>.

Active listening technique	Application in negotiations	Proposal parallel
<b>M</b> inimal encouragers	Regularly saying things like 'really', 'I see', 'interesting' and 'uh huh' shows you are listening and interested, encouraging the other person to continue.	We want our readers to be riveted. The closest parallel to spoken minimal encouragers is 'transition words' such as 'so', 'and', 'because' or 'as a result'. These words enhance readability. They make it easier for your reader to understand the flow of your narrative by making direct connections between phrases, sentences and paragraphs. Search engines love transition words - let's take a leaf out of their book.
<b>O</b> pen questions	'Who', 'what', 'when', 'where' and 'how' questions encourage engagement and show genuine interest. They offer freedom of time and content, helping to uncover what is behind the person's action and what it would take to resolve the situation. 'Why' tends to be avoided as it can cause a defensive reaction.	Written questions can help provoke the reader's mind to be curious to find an answer. Try using questions as headings - 'How will we deliver on time?' or 'How will we manage your project?' 'Who, what, when, where, how' also makes a valuable checklist behind the scenes to validate you have covered responsibilities, scope and timing. Adding 'why' tests for differentiation and value, which in our world won't upset anyone.
<b>R</b> eflecting & mirroring	When done with thought and care, playing back the same words and adopting the same action, rhythm and pace can be empathetic. Repeating the last few spoken words to start the next question is particularly effective.	Mirroring is one of the better-known proposal techniques. Reflecting document and/or question structures and playing back keywords shows you have actively 'listened' and makes it easier for the customer to read and evaluate. Replaying terminology and style helps build rapport.
<b>E</b> motional labelling	Directly suggesting the other person seems upset, angry, frustrated or any other evident emotion, shows you have tuned in. It can quickly elicit an acknowledgement and an opportunity for an open question to move the dialogue along.	Tune into your customer's thorny issues and dream-states. Vibrant, sensory language can bring your customer's thoughts and wishes to life on the page. Could you change 'Your primary objective is to improve customer satisfaction' to 'Your vision is to delight your customers on every step of their journey'?
<b>P</b> araphrasing	Repeating what you have heard using your chosen words demonstrates attentiveness. By using different words, you can test you have fully understood and give the speaker the opportunity to clarify or expand (also see Summarising below).	Although we've acknowledged the importance of thoughtful mirroring and reflecting, customers hate you cutting and pasting their own words back to them. They do, however, want to know you've understood them. So, be responsive but don't just hit replay; add some intelligent observation and insight.
<b>'I'</b> statements	'I' statements express the effect the other person or their actions are having on you. An 'I' statement might take the form: "When I hear you saying..." "I feel frustrated because..." This language shows you to be human, which can have a powerful effect on the other person liking and trusting you.	One of the top rules of a proposal is 'customer-first' - we spend hours training ourselves not to write about us, us, us. However, judicious inclusion of concerns and needs is simply professional. Share risks, assumptions, issues and dependencies openly - tell them what you need for a successful outcome. Be careful of trite 'I' statements like 'We believe our solution is ideal for you...' - this can suggest that you are not sure!
<b>E</b> ffective pauses	Carefully positioned conversation pauses - big or small - create space to work through emotion. They give both parties time for reflection and forward thinking, which can relieve pressure as well as create a positive push forward.	We want to give our readers time to absorb and reflect. We want to avoid them feeling crowded and under pressure. A well-structured document helps. Use sections, break up long paragraphs, keep sentences short and varied, and punctuate well. Put space on the page - wide margins, breaks before and after headings and around graphics.
<b>S</b> ummarising	Summarising is like paraphrasing but using the other person's words rather than your own. Repeating their words re-focuses them and offers the chance to confirm or modify. It also helps the negotiator to concentrate and remember specific points or language to reflect back.	Summarising regularly with connections back to your customer's stated dreams and problems will focus their mind. A brilliant summary will leave your reader in no doubt about the key points they should remember. It will leave reminders and nudges that build a trustworthy picture of a company that can help.

# THE EYES HAVE IT

KAT WYON

**'Necessity is the mother of invention'. A well-worn phrase, teetering on the brink of cliché. At its heart lies a simple message summed up by its close cousin 'Where there's a will there's a way'. We humans like routine and order. We work hard to create a daily life that's just so. A tool for every job. That sort of thing.**

But what happens when the job has no tool? Or it had a tool but it's no longer the right one? What happens when something doesn't work properly anymore?

The great inventions solve problems. Terrible inventions create pointless gadgets. I'm not an inventor. But one day my life changed. And with it, so did I. I had to. Out of necessity.

I once had a senior position at Lloyd's Bank, including looking after their bid function (as I had for other companies in the past). I commuted six hours a day. That's right. Six. I would read (and write) constantly. I played with my kids. I cooked. I ran around the block for exercise. I wasn't still for a moment.

Three years ago, I suffered a massive stroke. I stopped breathing. I'm only here today because I was quickly put on a life support machine. Intubated and hooked up to countless wires. My family were told to expect the worst. I didn't come around for a week. When I did, I was a different me altogether.

I couldn't see. I was weak. I was scared. I had terrifying vertigo. I slept a lot. I had lost 40% of the vision in both eyes (brain dead in my occipital lobe, if you'll pardon the jargon). Now, maybe seeing less well than before could have taken a more straightforward adaptation. But the pupil in one eye was dilated, in the other completely contracted. We rely on our brains to fuse the separate messages from each eye into one single image. But I had to deal with two separate images, one of which was tilted. Reading was fundamental to my life and to any hope of working again. And reading was beyond tricky with two sets of print on the page, one of which moved around. I had to find a way.



We began with a patch covering one lens of a pair of spectacles. I don't actually need regular spectacles. I could get blanks from the hospital (a narrow choice of stock, generally metal, unsuited to my petite head) or cheap readers from the pound shop, which are lensed. I was given a patch to go over them. Sadly, these patches were intended for children and came adorned with a beautiful star. I didn't fancy being seen in those once I began taking tentative steps outdoors. My ophthalmologist gave me occlusion tape. This makes the lens opaque but light is still allowed in, confusing the brain.

The inevitable pirate route of the black eye patch followed. The opticians sold me an extraordinarily uncomfortable black plastic monstrosity. I sourced a smaller one online which was no more to my liking - claustrophobic, hot and too close to my eye. I could feel my eyelashes rubbing against the material.

So, I then settled on a pair of reading glasses from Poundland from which I removed the lens for the left eye and stuck black electrical tape over the right. No more occluding for me! I was pretty pleased when my ophthalmologist confirmed I'd come up with a good scheme and I muddled through for about a year until the frame cracked. Next time, I upgraded myself to using black barbecue paint instead of tape. Much better looking. But soon I felt

the need to climb out of the bargain basement. It was time for a decent pair. I eventually settled on some lovely frames.

**"I want a black lens on the right side," I said.**

**"You mean opaque?"**

**"No. I mean black."**

**"Well, no-one wants that so we can't do it..."**

**Can't be done.**

It was true. I searched everywhere online. No-one does black lens glass. The fourth optician I visited finally agreed to opaque a lens down to black for me without resorting to paint. So now I have someone who'll source me blacked-out lenses.

It can be done, you see.

With immense thanks to Mark Davies for the title and without whom this article would have run to 100 pages.



**~~CAN'T BE DONE.~~ IT CAN BE DONE.**

# LEARN FROM DONALD TRUMP!

CHRIS KAELIN

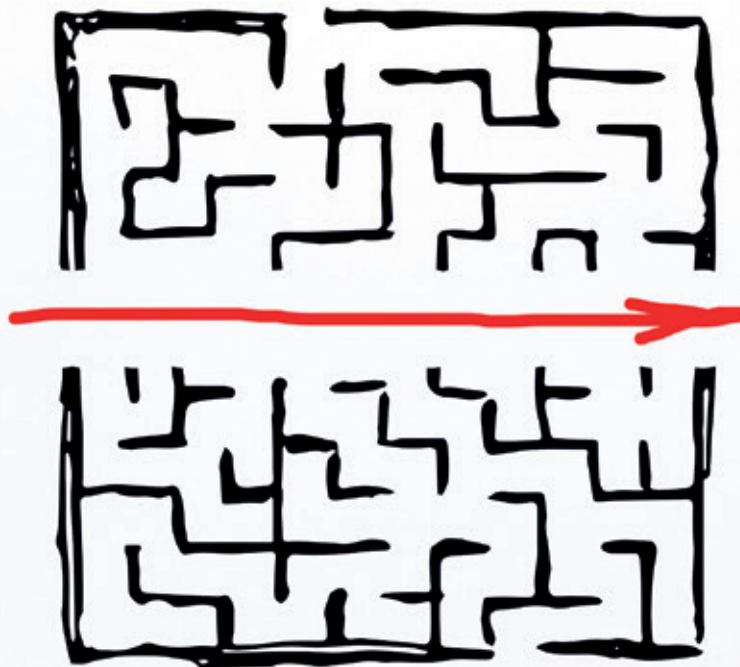
No, I am not talking politics. I am not talking about Donald Trump as a person, either. However, we can learn something from him that hasn't got anything to do with politics: his language. Despite improved online tools and with the Covid-19 pandemic, we communicate less and less face-to-face. As a result, the choice of our spoken and written words is increasingly important.

So, it's not about Mr. Trump's political agenda. It's about his language. To be more precise: the simplicity of his language. I strongly believe that one of the main reasons for successfully reaching his voters is how he says things. He makes extremely short sentences and he uses words that everyone can understand. Mostly very simple words. It doesn't matter whether this is due to his ability to translate complex issues into crisp messages or whether he is just a simple mind. I will leave this up to you. One thing is for sure: with his simple and straight messages, he has reached every single American, independent from education, race or social background. Trump's phrases usually come without subclauses or nested sentences. Actually, you can measure the simplicity of his language using so-called readability tests such as Flesch-Kincaid, Gunning-Fog, or Simple Measure of Gobbledygook (SMOG). For instance, the analysis of his inauguration speech showed that only a fourth- to fifth-grade level of education (9- to 11-year-olds) was required to follow Trump's words. You remember his campaign slogan from 2016? Correct: 'Make America great again!' - four simple words, one easy-to-understand, positive message. You remember Hillary Clinton's slogan? Probably not. Her campaign communication was rather academic, complex and elite. And Barack Obama? I'd bet my shirt you remember it: 'Yes we can!' Three simple words, positive. Bingo!





# KEEP IT SIMPLE



## What is valid for politicians is valid for your proposals, too

And why is this important for our proposals? It's about bringing messages across. We need to reach our clients in the same way that Trump reached his voters. Short and concise messages are easier to understand than long and complex ones. The most outstanding value proposition is useless when it is not understood. Unfortunately, many people believe that it is 'best practice' to write in a certain marketing-ish style ("We are the leading provider of...") but they get 'best practice' mixed up with 'common practice'. Everyone does the same (wrong) thing because it's within their comfort zone. But the fact that everyone does it this way does not mean that it's the best practice. There are better alternatives to a marathon of buzzwords. Such things are not best practice! Simplifying your text is much more efficient:

- **In our proposals, we should avoid sentences that stretch over three or four lines. We should make two or three short sentences instead. Unfortunately, when reviewing proposal text, we are tempted to 'improve' the text by adding more precision. In other words, by adding more details which in turn make the sentences (that might be read by those who might be the decision makers) longer and therefore more difficult to understand. You know what I mean.**
- **We make proposal text easier to understand by leaving out filler words like 'basically'**
- **Use active voice instead of passive voice: "We will deliver within two days" is better than "It will be delivered within two days"**
- **We should use everyday language rather than academic language or marketing twaddle. Unfortunately, many organisations have adopted an inflated expert lingo. This may sound somewhat professional but usually, it doesn't reach the customers' hearts and minds. I recently consulted a manufacturer of medical equipment, and we changed "The device will reduce the mortality rate" into "The device will save more lives".**

And here comes the best part: This is all very easy to do! Very often, writing down what we would tell our client in an informal and relaxed atmosphere is better than playing bullshit bingo. As a test, read it out loud and listen to yourself. Would you talk to a customer like this? Would you buy this?

**So: Simpler is better! When we explain the benefits of our products and services in a very simple and easy to understand manner, we will win more and more often. Easy, right?**

# ARE YOU LISTENING?

TIM SNELL



STRESS

PRESSURE

DEADLINES

ANXIETY

FAILURE

LONG HOURS

OVERWORK

PERFORMANCE

It was my birthday - July 28th 2009 - when I woke up not realising I had lost three quarters of my hearing in my right ear. I wasn't sure what was wrong at first. By the time I had jumped on my motorbike to go to work I knew something was amiss, but when I turned it on, the realisation of it struck me immediately.

A hopeful cocktail of anti-inflammatory medicines and some other miracle allowed my hearing to return within three months. It would take another three episodes before I would notice the link between moments of extreme stress, caused by a busy bid role, and my recurring bouts of hearing loss.

Was it really stress? MRIs, an ultrasound, a genetic test and a range of other diagnostics, and ENT specialists had been unable to definitively find a cause for the bouts of Sudden Sensorineural Hearing Loss. When I looked at everything, all roads led back to how I approached my work.

I knew I needed to change something, so I made the decision to leave a very senior position so that I could create more balance. The hearing loss events never returned. About a year after I made the change, I visited a Western and Eastern trained Ayurvedic doctor who gently told me that about the time I changed my work, my adrenal functioning had also collapsed and I had been in recovery ever since.

## What...?!

Humans weren't built to fire adrenaline constantly for years and I had been pursuing the wins for more than a decade, enjoying the thrill of the chase and ignoring the downsides. In reflecting back over my career, I also faced the realisation that I'd forgotten how to relax. My work was in the palm of my hands (as a Blackberry) and I was 'on' 24/7.

In the last 20 years I have witnessed the impacts of overwork and stress - on colleagues from across the stakeholder groups involved in bids, and at all levels of an organisation. It is exhilarating and exciting work to be involved in but there is a cost.

As an industry, we overlook at our peril the issue of working consistently long hours and the stress it causes. I believe it's up to each of us to be agents of change for the better. A couple of times a year we post on social media - "Are you okay?" - when we should be asking more frequently than that. The question should start with us - "Am I ok?" We owe that much to ourselves.

## So, what changed for me?

I wasn't used to listening to my body when it was telling me to rest - I just pushed on through; surviving on 4-6 hours of sleep, keeping a gruelling transcontinental travel schedule and 'working the time zones' to get bids submitted and to keep in contact with the office. I didn't slow down to enjoy the journey; I wanted to move as fast as possible and win.

In my work, I put the team and the bids above my own well-being because I was afraid each day that I would fail, or even lose my job if I didn't keep going. If this sounds familiar, it's time to pause, breathe and take stock. It's a story that's not always true.

When I started to set boundaries, no one objected; and when I took the time I needed, the world didn't come crashing down either. I remained passionate about my work, but I set limits. That in turn helped me to support my team, for them to gain more perspective and set better limits for themselves.

In the end I also listened more deeply and started pursuing more of the work I love in personal professional development.

We are facing unprecedented shifts in our work and our lives. We all have our own unique stressors. No matter the challenges you're facing right now, try to remember that there is support available, your health is your first priority and deep breathing does help to create more space for clearer thinking.

You are the most important person you're ever going to meet - make the time to put yourself first.



## AND THE NEED FOR **AUDACITY**

Back on 10th June 2019, the top movie at the US box office was *The Secret Life of Pets 2*. It grossed just under \$5m that day, from a little over 4,500 cinemas, on its way to total revenues worldwide of \$430m.

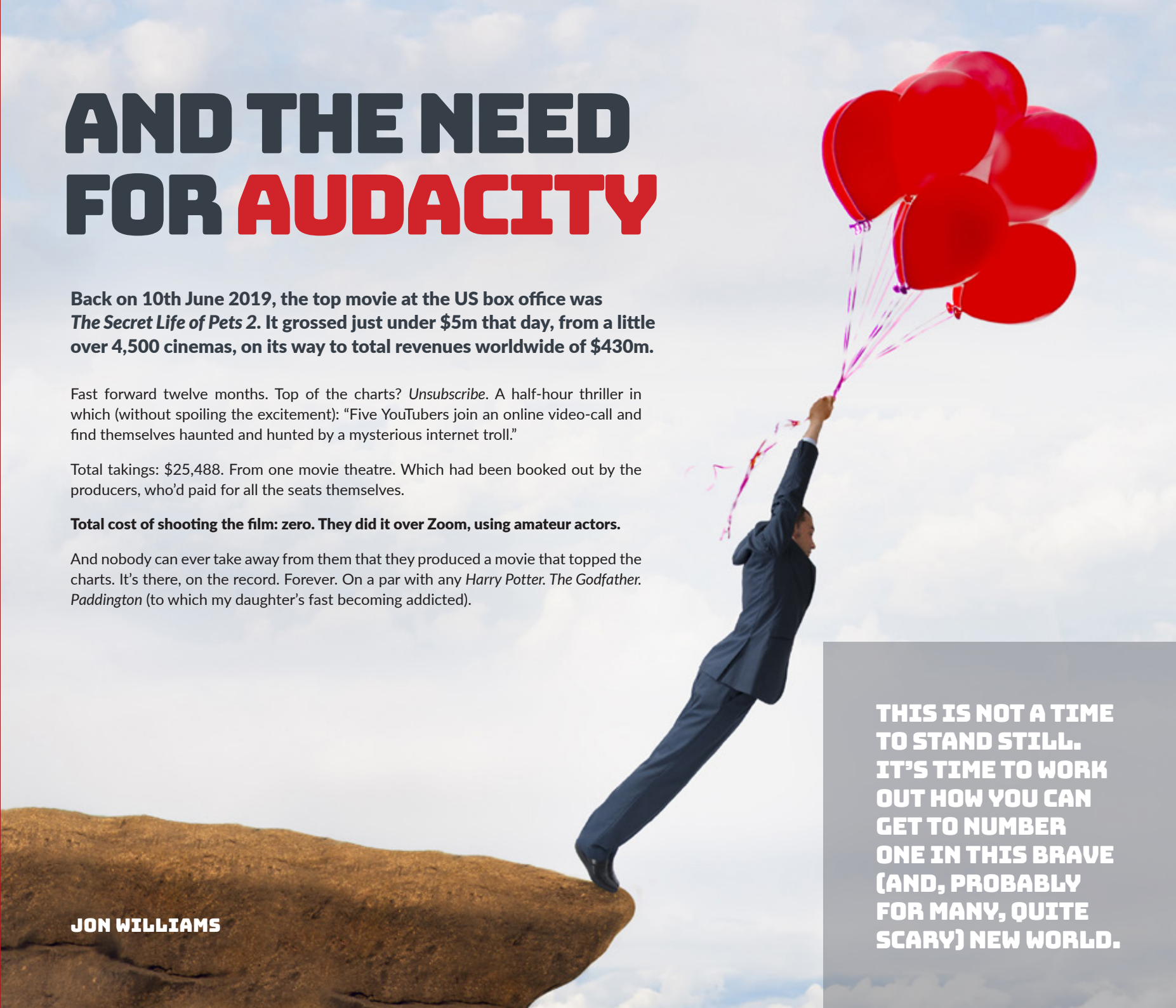
Fast forward twelve months. Top of the charts? *Unsubscribe*. A half-hour thriller in which (without spoiling the excitement): “Five YouTubers join an online video-call and find themselves haunted and hunted by a mysterious internet troll.”

Total takings: \$25,488. From one movie theatre. Which had been booked out by the producers, who’d paid for all the seats themselves.

**Total cost of shooting the film: zero. They did it over Zoom, using amateur actors.**

And nobody can ever take away from them that they produced a movie that topped the charts. It’s there, on the record. Forever. On a par with any *Harry Potter*. *The Godfather*. *Paddington* (to which my daughter’s fast becoming addicted).

JON WILLIAMS



THIS IS NOT A TIME  
TO STAND STILL.  
IT’S TIME TO WORK  
OUT HOW YOU CAN  
GET TO NUMBER  
ONE IN THIS BRAVE  
(AND, PROBABLY  
FOR MANY, QUITE  
SCARY) NEW WORLD.

So, how does this relate to proposals, I hear you ask? Well, directly, not at all. I'm not going to spin some tenuous yarn linking this to the skills needed for online pitching using Zoom, for sure.

### **But indirectly? Don't you rather love the tale?**

- **Being audacious. ("We've always done it this way" is too often the blueprint for a slide into failure.)**
- **Making sure you understand the rules of the game you're playing, and hence how to win. (How many proposals fail because the proposal team hadn't really got to grips with the evaluators' scoring system and their real hopes and fears?)**
- **Understanding the competition. (There wasn't much, to speak of. But they had to know that to time it perfectly.)**
- **Making people smile at what you've done. (We heard tell from one of our clients last year about the head of one evaluation team literally "taking the proposal out of their briefcase in meetings and cuddling it" because they loved it so much. Did the buyers do that with your last proposal?)**

I'd argue that too many proposal support teams out there spend too long in their comfort zone - or, if the status quo isn't comfortable, too long tolerating the situation. "This is how we do things round here" becomes a recipe for complacency. 'Good enough' is as good as it gets - even if 'good enough' isn't winning that many deals. "We know we're struggling, but we can't get it changed" becomes a source of stress for all involved. There's always an excuse for losing; a reason why the proposal document and pitch weren't as good as they could have been.

And the best teams? Success breeds success, of course. But their hunger for understanding best practice marks them out - as does their energy in taking the lessons they've learned and implementing them internally. They're passionate about hiring the best people - and those people are passionate about their own self-development. (Want to sharpen your bid or proposal skills? Off the top of my head, I could point you to more than fifty hours of excellent free audio and video content online - never mind all of the white papers and presentations out there waiting to be downloaded.)

As *Unsubscribe* demonstrated, the world's very different now than it was twelve months ago. 'Normal' is a thing of the past. Change may be forced on you - or you could seize control.

So, work out how you really think you ought to 'do things round here' to gain competitive advantage, whilst respecting the well-being of your bid and proposal professionals. Pluck up the courage to bang on the (virtual?!) door of your most senior executives. Proposals are the job protection and creation engine for many organisations, after all; you have a right to be heard!

This is not a time to stand still. It's time to work out how you can get to number one in this brave (and, probably for many, quite scary) new world.



# IF NECESSITY IS THE MOTHER OF INVENTION, THEN CONSISTENCY IS THE FATHER OF SUCCESS

TONY BIRCH

**Having worked with a large number of organisations (both ones that are successful and ones that are not), I have become convinced that consistency is one of the key attributes of successful business winning organisations.**

Marketing professionals have known this for a long time. Consistency builds trust and the more your customers (both existing and prospective) trust you, the more likely they are to want to work with you.

Organisations that win most of the opportunities they pursue deliver consistent, customer-focused messages to prospective customers throughout the buying cycle. They do this from first contact and all the way through to delivering the final proposal and closing the deal.

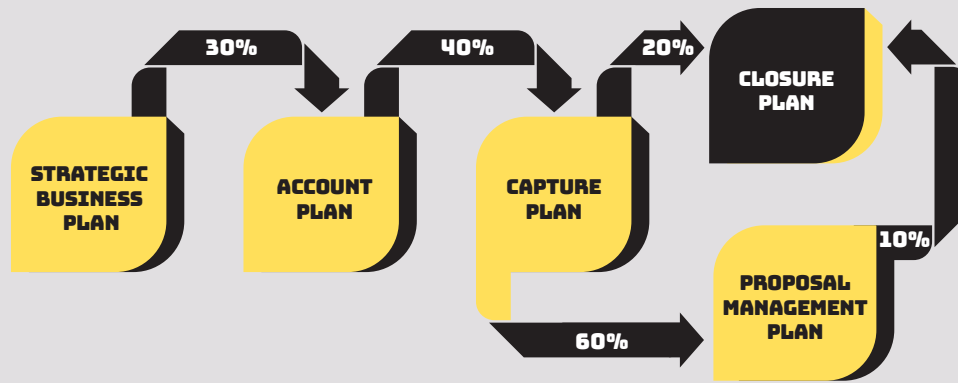
If the prospective customer receives inconsistent messages from an organisation, such as claims made in presentations that are not supported by the information contained within the proposal, those responsible for making the decision to place the work are unlikely to believe what they read in the final proposal and act accordingly.

The first thing that you can do to help to achieve consistency is to plan. Plans are not the most interesting things to put together. However, particularly in these times where most of us are working virtually, plans become an invaluable tool for storing and sharing information. The information contained within each level of plan should, of course, be relevant to the purpose of the plan itself, and also should inform other relevant plans.

In business winning, from the strategic to the tactical, the plans should all be linked and consistent. As shown in Figure 1 on page 15, each level of plan informs others. A significant percentage of the information that a Capture Plan contains is directly usable when putting together the Proposal Management Plan.



**Figure 1. Integrated, consistent planning information**



Consistency in how you behave and deliver messages helps customers to trust you and choose to work with you.

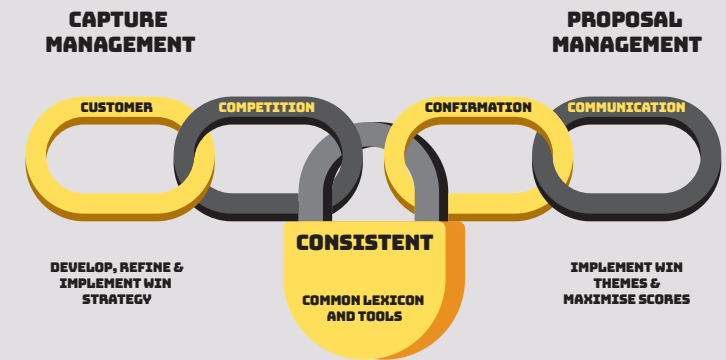
Too often strategies for winning an opportunity for new business are not thought about until the proposal is being developed. This is better than not having a win strategy at all, but how much better would it be if the proposal confirmed a win strategy that had been implemented with the customer over a longer period of time? Ideally, the prospective customer should have known long before they received the proposal that you are the right company for them.

A strategic plan is typically focused on an organisation’s mid- and long-term goals. It explains the strategies for achieving them, including the types of customers that you are planning to do business with. The Strategic Business Plan should include which types of new business you are planning to win and how the organisation is going to achieve that. Part of achieving the goals might be how the organisation is going to organise its sales activities, including setting up and managing accounts.

Account Plans are not, generally, opportunity specific. Rather, they cover a range of opportunities within an Account. They may be organised by prospective customer(s), vertical markets, geographical markets, or product/ service offerings. They contain information about who you want to sell to in the Account as well as what you want to sell. Over and above this, they should include an analysis of the competitive landscape, for your product/ service offerings within the defined Account. The Account Plan is one of the primary sources of early information for the Capture Manager.

During the early phases of the pursuit, the Capture Manager should ensure that the win strategy is developed, refined, and implemented. The primary tool that a Capture Manager can use to document and share the win strategy is the Capture Plan (as shown in Figure 2). The Capture Plan should document the win strategies being implemented during the early stages of the pursuit as well as how those strategies will be manifested in the proposal.

**Figure 2. Integrated and consistent win strategies**



A consistent and shared strategy helps the customer to confirm the decision to choose you.

Win strategy is developed based upon a good understanding of the competitive landscape; particularly in-depth knowledge of an individual prospective customer, including that customer’s perception of any competitors’ strengths or weaknesses. The opportunity-specific win strategy is refined as the competitive landscape changes.

When it comes to the time for proposal development and submission, the Proposal Manager should use the information contained within the Capture Plan as the basis for the relevant part of the Proposal Management Plan.

The Proposal Manager ensures that the organisation’s capabilities to deliver the solution, in accordance with the win strategy, is communicated to the customer in a way that will maximise the proposal’s scores.

Capture and Proposal Management are separate disciplines, linked by a common goal: winning a new business opportunity. Key to the successful integration of the disciplines is the management of the development and delivery of a consistent win strategy, one that works during the early phases of the capture process as well as in the proposal.

# SPOTLIGHT

## ON PIPPA BIRCH

### Greatest achievement in bidding?

Pipster Solutions, naturally! In nine years, I have built up a healthy client base, helped many businesses win some cracking contracts, and enabled companies to reach further than they thought was possible. I love that. I also found the APMP, which has provided me with a wonderful bidding community (which now reaches even wider than the APMP). It is a community that has supported me and enables me to support others.

### Best advice you've been given that's helped you in your work?

Way back before I came into bidding, and when all documents were provided as hard copy (I am that old!), a Commercial Manager told me to "Turn every page". It's that simple. Clauses and instructions can be hidden, nuggets of information can be picked up to be used to tip the balance in your favour. One page not read could be the difference between winning or losing, or at worst, could be contractual suicide.

### Guilty pleasure?

No one bothering me while I drink coffee and eat toast and marmalade while curled up on the sofa in front of "First Dates"!

### Describe yourself in three words.

Positive. Friendly. Resilient.

### What advice would you give your 18-year-old self?

I was off to India with a backpack at 18 after not getting the A Level results I wanted. Best thing I ever did - I was already quite good at adapting to circumstances. However, I should have told myself that not everyone will like me and that is OK. You can't please everyone. You can only control how YOU react to situations - you cannot control others' reactions. Have confidence in your abilities but push yourself a bit further than is comfortable to ensure you achieve more. Most important, be yourself and be kind to others.

### What was your dream job growing up?

I wanted to be an actress in musicals on the West End stage. I would still love to do that but apart from being able to hold a tune, I don't have the singing voice! However, I'm sure Banana the Office Hamster will tell you that my rendition of the songs from *Miss Saigon* is bloody beautiful.... \*snort\*

### What questions are you asking yourself?

Could I be better at what I do? Am I really giving my clients the best service? Will my teenage daughter ever take her hoodie off and get some sunlight? Why can't I eat what I want and remain healthily thin?

### One thing you'd like to do better?

Office 'stuff' and other things that I should keep on top of, like updating my CV and finishing my website. I love my work, I love my life, but the administration, filing and tidying of my office is always a chore. I need to make it more fun, I think. Kind of Mary Poppins-esque, with a cheery song and a sprinkle of magic!





### **If you won the lottery, what would be your first indulgence?**

My first indulgence would be tickets for a trip around the world because I never travelled as much as I wanted. After my teenage backpacking in India, I always thought I would spend my life exploring whenever possible, but circumstances change, adulthood happened, and it never quite panned out that way. When I get back from my trip of a lifetime, I'd buy a glass fronted house on a Cornish beach and paint. I have no regrets, but a lottery win would enable the dreams!

(I feel I should probably say there would be plenty for my family and the charities I support, but I was doing what we, as bidding people, should do - ATFQ!)

### **Favourite pastimes?**

One word - MUD! I love Obstacle Course Racing (OCR). Not that I race. I tend to bumble round for a couple of hours trying to scale ridiculously high walls and making mud angels in between. Plus sticking my hands in some compromising places while helping fit men scale said walls. Joyous! Seriously though, the OCR community is such a joy to be part of and I am missing it hugely this year. It's a sport that is focussed on teamwork - supporting and being supported no matter what your daily life entails. I miss that interaction and escape from family and work. It is basically keeping fit while channelling your inner child and shirking adult pressures for a while - what's not to like?

### **Most important lesson for life in general?**

A strong handshake, direct eye contact and warm smile goes a long way. (Obviously no handshakes during these times of social distancing!)

### **What's precious to you?**

Simple. My daughter. No contest.

### **What advice do you have for newbies in the bid profession?**

Be confident in your abilities but be humble. Keep learning - you will never know it all. Do not be a diva - get stuck into teamwork and do what needs to be done.



# SURVIVING 'SNAKES AND LADDERS'

# BY NOT ROLLING THE DICE

**JEREMY BRIM**

**GET APPROPRIATE  
SPONSORSHIP BEHIND YOU**

**GET ENTREPRENEURIAL**

**GET GOOD QUALITY  
RESEARCH IN PLACE**

It's easy to make good decisions when you're successfully climbing the ladder of growth with a tailwind of a booming economy. Your leaders can take their pick from the abundance of opportunities, giving themselves time and space to calmly develop relationships and select the best path to meeting your business plan and strategic objectives. But now the economy is a busted flush. As someone put it to me recently - we're all circling the same toilet. Markets are either experiencing tumbling demand or rocketing competition as government-propelled stimulus projects and programmes become the golden goose everyone wants to land.

**GET THE BEST TEAM  
MEMBERS ON BOARD**

So how do bid teams make the best of it while their employers are sliding down the snake of a market depression? Many bid functions will be coming under immense pressure, with panicked leaders grasping for any opportunities they can find - at best gaming, at worst ignoring your bid/no-bid governance to force through as many bids as they can get their hands on.

Now is the time to use our brains, not our brawn. Good bid professionals tend to have high levels of empathy and emotional intelligence, complemented by great analytical skills. It's time to put them to good use - upstream - and influence the best outcome for your team and the business. Utopia in work winning is a beautifully aligned and professionalised approach to key account management, capture, pursuit and then into bids and proposals - co-creating and solutioning deals with clients and negotiating contracts. But let's face it, that's so rare most of us have never seen it. In the real world in most organisations, you may not have the time to deploy full capture but you can make the space to get into the pipeline and turbocharge some pursuits.

Governance levels in most organisations are running at an all-time low, with executives having become more flexible in response to the pandemic. This is a risk for them, but also an opportunity for us as they are more open to new ideas that demonstrate value. You need to land it sensitively, but now is your chance to show your true value and change the game when it comes to bidding in your business.

**NOW IS THE TIME  
TO USE OUR  
BRAINS, NOT  
OUR BRAWN**



Right now, in my view, the key to maximising your conversion of the bids you have the capacity to deal with is to get ahead of bid/no-bids; get into the pipeline, research opportunities and drive pre-bid activity to position for it. Block out half a day or use the weekend if you have to; it's an investment that will pay off. On your own or hopefully with some decision makers, open up the pipeline and score it, prioritising the pursuits where you have the greatest chance based on your existing bid/no-bid criteria, e.g. strength of relationships, ability to deliver, competition or incumbents, and client situation (will they exist, can they pay, etc). Then perhaps take the top five opportunities and deploy a simple accelerated pursuit methodology like this:

- **Get appropriate sponsorship behind you and assign a bid leader now to drive the pursuit**
- **Get good quality research in place - fully understand the client, their influencers, the opportunity and the competitive environment**
- **Get the best team members on board - go and get buy-in from the best in the business to support and play a part in your pursuit, the solution and eventually the bid team**
- **Get the right people in front of the client before the bid lands - never forget that people buy people and what they can do for them. Perhaps hook the client in for a Teams call with something valuable, e.g. a discussion on some thinking or research you have that they don't (that happens to support your proposition to them)**
- **Get entrepreneurial - get working on the solution now, figuring out how you'll deliver their needs while looking for how you'll innovate and create more value for the client than your competition. If you can, draw the client in for workshops to test and co-create solutions to their problems or provide some free advice.**
- **Get guerrilla marketing going - wind in your marketing function to support the pursuit with aligned campaigns and thought leadership that supports your messaging and challenge them to be smart in how and where you position yourselves**

In summary, don't just roll the dice by bidding everything that comes your way - turn the odds in your favour by being selective, entrepreneurial and smart, looking to influence the outcome you need.

# YOU CAN'T ALWAYS GET WHAT YOU WANT

GRAHAM ABLETT

Adversity will mean so many different things to different people. We live in a world where people have to face much more adversity than me. So, when Martin asked me to think about the topic, I found it quite a challenge as generally I think I've been dealt a pretty good hand. Great family, amazing friends, brilliant colleagues. But like most people, I have faced some tough challenges along the way, so here goes...



If I think back to my early career, shortly after finishing university, I had a real struggle balancing everything going on in my life. It led to a bout of ME (also known as Chronic Fatigue Syndrome) - complete and utter physical exhaustion. This was tough to handle and required more than a simple fix.

I'd got my engineering and business degree from university in London, which was great - but to be honest, it wasn't my main area of focus at that time of my life. You see I'd only really gone to London because I wanted to go to the best fencing clubs in the country. Fencing was my passion. By the time I moved down south I'd been ranked number one in the UK at under 14 and 15 age group levels and had won the national under 17 championships. This was a decent track record considering most fencers in the UK come from fee-paying schools where the children are taught fencing as part of their physical education. I attended fairly normal, publicly-funded schools in the East Midlands - not considered a hotbed for fencing!

At 17 years old I got the best home nation result in my first under 20 World Cup event. The stars were aligning for my next goal - qualifying for the under 20 World Championships. Four fencers qualified each year. The problem was I came fifth that year and each year thereafter - narrowly missing out time and time again. My final year was the hardest to take. I had the best international results but had struggled to translate that form into the domestic tournaments. After this happened, the powers that be changed the weightings to put more emphasis on international results. But of course, that was no conciliation for me. I was truly devastated. Nowadays I realise this had a big impact on my mental health and wellbeing.

Moving on, I was now in the seniors. More competition, but the same qualification with the top four in the rankings going to the World Championships. It wasn't easy coming off a disappointing end to my junior career and then suddenly fighting Olympians and veterans of many World Championships, plus everyone else. But over a few seasons my renewed focus on domestic events and continued training regime regularly got me into the country's top ten. I got a bronze in the individual national championships and made the quarters on several occasions. Twice I was a member of the national club championship winning team.

One year I found myself in great form. A year with two opportunities: qualification for the World Championships and the Commonwealth Fencing Championships. Coming third in the first two domestic events got me in to qualification spots for World Cup events, where I could get additional qualification points. But I then had some of, quite possibly, the biggest setbacks of my fencing career:

- **Competition was harder than ever, with lots of people vying for those team slots**
- **Twice travel problems meant I failed to get to World Cup events and missed out on qualification points**
- **I was also starting to feel the pressure at work as I really started to get into my bidding career and was feeling the strain**
- **I had the stress of being a key witness in a crime that took place in my shared house in London - a very nasty, racially motivated, aggravated burglary with the intent to cause actual bodily harm**

No surprise, this took its toll. At one point I caught what I thought was an innocuous cold, which ended up as a virus and was later diagnosed as ME. I couldn't really work or train as a result. The impact: I ended the year ranked just outside the qualification for the Worlds again. But this time there was a silver lining. I had finished fourth in the English rankings, which meant Commonwealth qualification and a trip to Malaysia. The incentive to get my body and head back was there, and I enjoyed a fabulous two weeks, culminating in helping our team battle through each round to the final, where we won gold.

### **What did I learn?**

You can't always get what you want, even if you really want it. Always give things your best shot, then you can't be too self-critical. There will always be learnings, but if you know, in your heart of hearts, that you did your best then you really can't ask for more.

You can't control everything, so don't beat yourself up if something that's not in your plan impacts your goal. You need to be able to adapt and adjust all the time. Don't let change hinder you. Deal with it and revise what you need to do accordingly.

It's okay to be disappointed. Take the knocks on the chin. Think hard about what happened and why, and how you could do things differently next time. Remember that a tough goal usually requires a long, hard journey that has lots of small steps along the way. Make sure you acknowledge the achievements made on these steps as there can be lots of positives hidden in there. Remembering those can make disappointments more palatable.

Mostly, hard work and determination get you a long way. You need the motivation of a goal to stay focused. And, as we bidders know, everything is easier if you can make it fun.



APPLY A GROWTH MINDSET TO

# ACCELERATE YOUR PROGRESS

PETER MCPARTLAND

The Covid-19 lockdown presented an excellent opportunity to assess if we operate with a fixed mindset or a growth mindset. From the outset, I felt the changes forced through lockdown (as ever the optimist) provided an excellent opportunity to evolve our bidding approach by embracing the circumstances and encouraging the adoption of new ideas, tools and support. I've highlighted three areas that I've found to be important in achieving this...

## 1) Be passionate about feedback

Exploring new ways of working together, trying out new tools and applying new processes means we are asking people to climb the learning curve. The steepness of the curve can be daunting for some; for others it's exciting as the progress is quite visible. Bids and presentations provide us with opportunities to work with different people in project groups. It is important to pass on that learning from one group to another and use it to generate further learning.

Having an open culture of multi-way feedback gives everyone a chance to grow. Plus, it opens up communication channels and engenders trust. Regular internal group feedback following each bid has become an even more valuable tool to identify the best and worst of our new adoptions. It also provides a strong platform for enabling others to quickly take advantage of the better practices - and, importantly, further improve those through feedback.

Where we are embracing new ways of leading people through bids, I've found there is an increasing vigour for engaging in internal feedback and continuous improvement.

## 2) Mitigate risk through contingency planning

When adopting new ideas and tools at pace, it is important to appreciate the risks. Working remotely and using collaboration platforms (particularly for the delivery of pitch presentations) demands a risk assessment to ensure there is individual confidence/capability as well as adequate cover for technology failings. Dry runs and testing, including trialling system performance with clients is key and I've found people to be more committed than ever to thorough preparation and contingency planning.

Again, providing a forum for people to share their fears provides an excellent opportunity to create solutions, distil nerves and further build confidence that having a growth mindset need not generate anxiety.



## 3) Help people to press the reset button

While remote working may be a relatively new concept for some, the adaptability of both employees and employers has been remarkable. However, statistics showing a 25% increase in our working hours (from 9 hours to 12 hours) comes as no surprise to us. Admittedly, the removal of travel time compensates to some degree, but it's easy to see why people were feeling that during March, April and May there was no escape. Some people have turned their living spaces into makeshift offices, making it nearly impossible to disconnect from work. Even people who worked from home before March invariably would not do that without getting out to visit an office or meet up somewhere in a pre-Covid-19 working week.

Our role in the leadership of bids demands we pay more attention than ever to the wellbeing of everyone involved. Encouraging people to identify (and use) the activities that help them with their personal reset buttons is part of our duty of care. Leading by example, sharing what works for you, blocking out time, committing to it and encouraging others to do the same ensures the energy levels and mental resilience of those working on bids and presentations in this new world are maintained.

## Take control

"There are many positives and negatives to the lockdown.", I would hear people say. When I hear that, I feel that the circumstances and not the people making the comment are in control. The circumstances are the circumstances. Being open-minded, willing to try new things, considering new ideas takes back control.

Facilitating continuous improvement through regular internal feedback, strengthening confidence in new ways of working through enhanced risk management and encouraging people to escape from the screen more regularly are areas I'm prioritising much more than I did before.

## LIFE OF A BID CONSULTANT IN LOCKDOWN

# JUST A USUAL WEEK AT HOME?

ANDY HAIGH

### SUNDAY

The contract was agreed last week. I get an email from the client giving me my system login details. I am surprised they can get their support people working on a weekend, whilst in lockdown. Perhaps it is me who is mad, looking at my emails on a Sunday? However, I file the information away and shut the door of my home office.

### MONDAY

The client's laptop turns up by courier, with a sheet of instructions. It boots up and I spend a couple of hours working through the various registrations and security checks. The login details do not work, so I phone the assistance number given in the instructions. I get through to someone but we struggle to understand each other. Eventually, he links in remotely to my laptop and fixes the problems. I find the information my sponsor wants me to read and spend a few hours going through it. By the time I have read it all, my dinner has gone cold.



## TUESDAY

We have an early morning team call to get started. It is held by videoconference and it feels a bit odd. It had to be early because my client has back-to-back video calls for the rest of the day. I am the only one with video on. I find out later that I was the only one on the call not in my pyjamas.

I start work and try to use the client's laptop with its 13" screen and tiny keyboard. I find a pair of magnifying spectacles and try again. After a while of poking various buttons, a message comes up and tells me that I will be locked out if I don't do a mandatory online security course for contractors. This requires a new program to be installed. I download the program. I cannot install it because the security system on the laptop stops me installing anything.

I call the assistance number and get through to the same person again. We still cannot understand each other. Eventually, he dials in to the laptop again and installs the software for me.

The dog is sick on the carpet. I discover from my wife that this is a "major life crisis". I am told, clearly, it is my dog (not ours) and the carpet will be ruined forever. Moreover, it is patently clear that I have let the dog eat things - again. I learn that letting the dog eat things is a heinous crime.

One washed and dried carpet later, I am back to the laptop. I normally work with an arrangement of four screens with a 30" screen in the middle. I find this is the best way to work on several complex documents at the same time. So, I decide to connect my 30" screen to the laptop. It is a simple HDMI plug.

An hour later I call my assistance number and the person connects to the laptop and gets it working again (with my big screen attached).

I start the security course and find it is 17 modules, each of which lasts six to nine minutes. Then there is a test at the end. If you don't pass the test, the system will not let you in.

The security course does not recognise my login, so I start the "Forgotten Password" routine. An hour later I am locked out of everything. My assistance man dials in to my laptop and unlocks it. It is after 18:00 so I finish for the day.

## WEDNESDAY

I start the security course. All is going well and I now know some more about IT security. Then my phone rings. I miss part of a module. When I have finished on the phone I have been logged out. I start the course again.

The dog is sick in the kitchen. I clean up. I start the course again.

The client rings to say that the presentation that I am due to give this afternoon has attracted a lot of interest. It now needs to start at 17:00. This is so his boss can dial in from overseas. I say OK and go back to the security course. I have been logged out. I start the course again.

At 16:30 I do some final tweaks on my presentation and join the call at 17:00. Several important attendees have not yet dialled in, so we wait. After 30 minutes, once the client's boss has arrived, I start and have the weird situation of presenting to a camera and getting virtually no feedback. I miss the eye contact with my audience, but I soldier on.

After about 45 minutes I stop. I invite discussion and questions. To my surprise, they have been listening. The questions go on and only run out at about 19:45. I am pleased that the client seems to be happy with what I have said to the team. However, the dog has the 'hump' as he has not had his walk, my wife is not talking to me and my (dried up) dinner is in the microwave.

## THURSDAY

I start the security course again. I take the test at the end of the modules and fail. Most of the questions seem to be about software development. I don't do software development. I take the test again and scrape a pass. My laptop is now prevented from getting locked. Whoopee!

## FRIDAY

We start with a call at 09:00 and then go into a series of virtual meetings. We make good progress and I am feeling chipper about how things will go from now on.

I go for lunch. I return and try to log in to my computer. A message comes up: "Your password is out of date. Please follow the change password procedure." I do this. An hour and a half later (including a call to the assistance number and the technician connecting to the laptop) I am operational again. During this time, I have joined two calls by phone. However, most of the conversation was about documents shared on the screen, so I could not contribute very much. When I finally join on the laptop, everyone is slowing down for the weekend. Ah well...

**So ends my week. I have delivered about 10 hours of useful work and spent 53 hours working. I have battled the laptop and won (at least for the time being). I am now a proven expert on software development security processes. I have a weekend to repair damaged marital relationships and walk the dog without letting him eat anything. Perhaps this is how to overcome adversity, just keep going, deal with problems as they occur and try to keep each crisis in proportion?**

# KEEP EACH CRISIS IN PROPORTION

# ABOUT OUR EXPERTS



## 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.



## Chris Kaelin

Chris is a global authority on bid and proposal management. He was co-founder and chairman of the German-speaking APMP chapter and regional director for Europe/Africa. He is APMP-certified at Professional Level (CPP APMP) and is an APMP Approved Trainer. In 2013, he received the prestigious Fellows Award.



## Sarah Hinchliffe

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



## Tim Snell

Tim is a freelance Capture Specialist/Trainer, Business Winning Consultant and Executive Coach. He has shaped his career helping companies create successful, high performance bid and proposal teams in the UK, the Middle East and Australia. He volunteers as the Deputy Chief Examiner for APMP, is a professionally trained and certified Coach, and holds APMP Professional Level certification.



## Kat Wyon

Kat is the Research Director for Strategic Proposals. She is an APMP fellow, one of only a small number across the globe and also holds APMP Professional status. Kat is highly respected thought leader in the proposal profession and has a fantastic track record of winning business.



## 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 thirty countries; and trained many thousands of course participants.

# ABOUT OUR EXPERTS



## Tony Birch

Tony Birch is the founder and current Chairman of Shipley Limited in the UK. Tony served on the main board of the APMP for four years and was elected a Fellow of the organisation in 2006, for his work in developing and launching the APMP's Certification Programme. Since founding Shipley, Tony has trained thousands of sales and bid professionals around the world.



## Graham Ablett

Graham 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.



## Pippa Birch

Pippa has been a Bid Writer for over fifteen years, working as an employee for major companies within the Highways and Civil Engineering Sector for the first ten. She started freelancing in 2012 which led her to write for companies across a variety of sectors (construction, facilities management, custody and forensics).



## Peter McPartland

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



## Jeremy Brim

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



## Andy Haigh

Andy is an expert in bidding and tendering, specialising in competitive formal bids into EU Public Sector organisations. He is an authority on EU procurement legislation and can bring all these capabilities together to initiate and drive major complex bids through to a successful completion.



BIDDING QUARTERLY

# NEED HELP AND ADVICE?

ASK ONE OF OUR EXPERTS AT  
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