

# BQ

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# PURSUE YOUR PASSION

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DESIGN BY  
SMSW MEDIA  
BID MARKETING  
EXPERTS



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# FOREWORD

**Whilst canvassing ideas for Issue 6, we were overwhelmed by the energy and passion our experts showed for a variety of different subjects. Rather than stifle this, we decided to remove the shackles and let our experts run free. The only request? Write about something you are truly passionate about right now in the bid and proposal profession.**

Once again, we have a fantastic range of articles covering everything from becoming a doctor to Excel modelling. In our biggest issue yet, there is advice on effective knowledge sharing, writing proactive proposals, client focussed innovation, creating high scoring answers and even the odd rant about challenging procurement rules.

We have been truly humbled by all the positive feedback from the first five issues – but BQ will be changing soon. Moving forward, we will develop industry focus groups, provide opportunities to submit white papers, sponsor key industry and professional research whilst still providing honest, unbiased opinion on subjects that matter most to you.

If you have genuine bid or proposal expertise in a particular field or industry, or believe you have a unique approach to winning business, I'd love to hear from you – the panel and BQ wants you!

*Martin*

Simon Wellstead

## I HAVE A PASSION FOR SIMPLICITY; I ENJOY THE SIMPLE THINGS IN LIFE.

**All of my passions come down to simplicity and perhaps that's because I am really good at 'simple'.**

Please do not mistake this for lazy - I believe a lot of progress in the world has come from people that want to find an easier way.

It speaks volumes that I stumbled upon a career into which I could inject simplicity.

Business has become incredibly complex. We have gone from signing 'fag packet' deals in the pub to an extremely rigid and complex process that, as suggested in Pippa's very honest article, has become so unbalanced it doesn't seem fair!

### THE WORLD IS CHANGING

We live in a crazy world with people on YouTube unpacking toys and making millions (for anyone who is interested; around £1,200 per million views). And we all know that LinkedIn is full of 'influencers' that don't seem to say much and many intelligent people seemingly aspiring to be like those influencers (people who respond to Oleg).

Then there are the industry disrupters with billion pound valuations but are yet to make a profit.

And although I don't think we should blindly follow these fresh faced disruptors down a potential blackhole (Theranos), we can all learn from how they attack problems in a completely different way to traditional businesses; they look for the simplicity and the convenience human's desire, and design around this.

### BLINK AND YOU'LL MISS IT

The way we should approach campaigns, whether that be sales, bid or marketing, is to cut through the complexity and get to simple quickly.

I used to call it "take it to the pub". If we had ten minutes over a drink with the ultimate decision maker how would we either get them to make a commitment or stay for another drink.

The reason I say "used to" is that ten minutes is now a luxury. We have to be even quicker in engaging people and getting to the point. For example, when presented with a concept for a Facebook video ad, (which I had penned and thought was awesome) our head of digital said "Si, we have 0.4 seconds to get peoples attention and stop them scrolling, the brain recognises an image in 0.13 seconds, you need to stop people scrolling ... start again".

Like I said, its a crazy world and we must adapt. Make sure your presentations or bid design captures your value proposition in under a second.

### CHOPPING LEMONS

Pizza Express bar staff used to chop the lemons for drinks (prep area, chop, clean) - across 500 stores this was a costly exercise! One day a Chef said "Why don't we do that? We do the chopping, you do the pouring?".

The CEO said "just by changing who chops the lemons, we were able to make a significant saving in hours which translated into a significant financial saving".

Our conscious brains overcomplicate things. We can't help but overthink and try to be clever. Trust your gut to deliver simplicity. The simplest change can be the competitive difference you need to win.

### KEEPING IT REAL

Airbnb experienced the common startup struggle of making their business idea relevant (problem to solution fit)

They found a simple solution which Co-founder Joe Gebbia explained "We used to travel and actually stay with our customers ... it was the ultimate enlightened empathy - you were so close to the people you were designing for

*that it informed you in a way that an online survey never would. So by being so close to our customers we were able to listen to their needs and then design a product that they loved."*

By living your ideas and making them real you avoid becoming overly intellectual and keep things grounded in the practical.

### KEEP IT SWEET

In the words of the mighty Steve Jobs, "Innovation is saying no to a thousand things."

It is easy to get carried away. People try to add too much and create too many product features in a bid to differentiate and hit everyone's hot buttons. This ends up creating complex value propositions that customers can't understand.

### THINK SMALL

Steve Jobs also said "Simple can be harder than complex. You have to work hard to get your thinking clean to make it simple. But it is worth it in the end, because once you get there, you can move mountains."

Businesses are self-complicating systems that constantly add extra levels of process and systems. In a complex working environment creativity and innovation get stifled. You need to think like a start up, embrace simplicity and see the power that creates.



Nigel Hudson

## YOU, YOU, YOU



Do you remember the “2:1” proposal-writing rule about customer centricity? That we should mention the customer’s name first and at least twice as many times as ours? We bidders obsess about it, ensuring the benefits of ‘our’ proposal are immediately obvious to whoever reads it. Yet something seems to change when we remove our proposal-writing hat.

Re-read the opening paragraph of this article. There is only one reference to ‘you’ but three to ‘me’ (Nigel Hudson, me, me). That’s 1:3. And I wrote my name first. Bad form, Nige, bad form. But I know the rule. So what happened?

It’s too easy to shine a light on oneself when placed upon the pedestal of opportunity.

Think about your most recent job interview (and, indeed, your CV). Was it all about you? Or was it about what you can do for others, delivering the value and benefits they seek? Did you focus on their issues, motivators, and underlying needs, making their eyes

**“Nigel Hudson: BidHub professional development expert and Bidding Quarterly contributor.” Wow! Such status, respect and profile. It makes me feel great. But it’s not about me; it’s only ever about you.**

shine as – dazzled by the brilliance of what they could achieve if they employed you – they realised the potential of their opportunity? Or was it a case of: “Me, me, me; I’m great! What? You’re not hiring me?”

### WERE YOU THE LIME OR THE LIGHT?

Consider the BBC, whose mission is to “Inform, Educate and Entertain”. They know that they’re a public service organisation whose actions aim to deliver value to their viewers, readers, and listeners. We could do the same (perhaps adding “Inspire” as a fourth value), knowing that it is everyone’s duty to be a role model and thus to lead by example. How, then, do we demonstrate this?



### KILL THE EGO, ACT FOR OTHERS.

Remember Bidding Quarterly Issue 4? The one about Health & Wellbeing in a profession shaped by deadlines, customer demands and business pressures? It got right to the heart of what people care about and, because of this, is going to have lasting impact. But there’s more. BQ4 was picked up by The International Centre for Thriving at Work, located within the University of Chester Business School. This thought-leading research centre acknowledged the challenge we bidders face as we try to develop our skills in such a high-pressure working environment. Also acknowledged, from an academic perspective, was that it is an insufficiently understood (and acted upon) phenomenon.

Thus, I have agreed to spend the next three years with them, volunteering twenty hours per week of my ‘spare’ time, conducting doctoral research into workplace learning in high-pressure (bidding) contexts. It’s my commitment to you: giving you ‘my all’ to provide you with the ‘inspiration, information, education and entertainment’ to better support, nurture and reward your professional development. I’ll share my findings with you as I go, and will be receptive to your participation in the research. It’s the biggest, scariest, most daunting, and yet most exciting, transformational and promising thing I’ve ever done. And it’s all for you. “2:1. For your benefit.”

Pippa Birch

## SO, YOU REALLY WANT TO WORK DIRECTLY WITH SMALL AND MEDIUM SIZED ENTERPRISES?

**I am increasingly frustrated with the complicated procurement processes faced by smaller companies. Government clients are currently pushing the local Small and Medium Sized Enterprise (SME) requirement in bids. This is good news for the client and SME. The client removes fee-on-fee and demonstrates they are committed to sustainable construction. SMEs can work directly for the client and build their businesses, without relying on subcontracting to larger companies. Several thousand SMEs shout "Hurrah! We can take on the 'Big Boys'!"**

And then the tender comes out in all its complicated glory - reams of documents and instructions on complicated portals, with little regard to the bidding capability of the intended audience.

It is at this point SMEs realise they have no idea how to respond to these contracts nor have the resource to put together a winning bid. Much of the time they don't even understand the process, let alone individual questions. And the portal? How on earth do they work with that? Not to mention the hundreds of Technical Queries (TQs) that seem to land daily. Even the Bidders' Days at the beginning can be confusing for many.

I'll give you an example: a government framework. Starting with 80 live tender documents, 201 qualification questions, 15 technical questions and a price workbook followed by 469 TQs and two extensions of time - when will it end? And

how does the average SME, who the government wants to attract, manage a bid like that? Many of these small, specialist companies typically have a Managing Director, one office administrator, another person that does 'everything to do with Safety, Health, Environment and Quality', and a handful of supervisors and operatives out on site. They don't have any bidding capability, or even the budget to bid effectively.

One tender I was writing asked for KPI Data for the last five years across five different disciplines, company carbon data records, BIM Maturity Level 2 and a list of ISO system requirements that would make your eyes water. The company (the type of SME they were targeting) delivered one simple, specialist discipline with a small team. They had managed to achieve 9001, of which they were very proud; but KPIs? Carbon data? 27001? BIM? Not a chance. Many SMEs are non-compliant before they even start.



## SO, WHAT IS THE ANSWER?

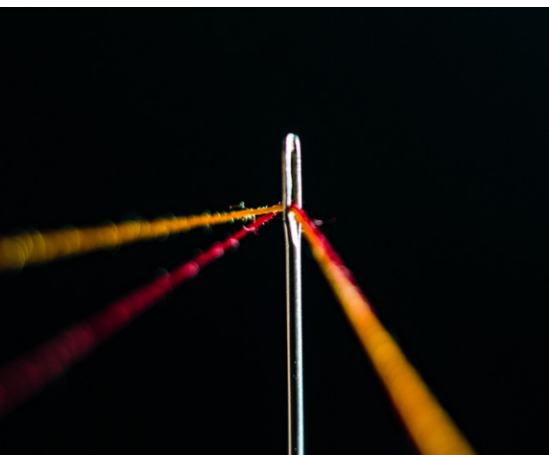
**For my SME clients, the answer is me.**

I patiently walk them through the process and create a simple, and compliant, bid. But it is stressful. There is no Bid Coordinator to field all the TQs and document updates. It takes time to explain what the question is asking for, pull the right information out of the right person and present it properly. Bid library? Nope. Case studies? Very often none. A common thread in my world is "We just get given the work and we do it. That's about it.", so I must just get on with it and work my magic to write a compliant, high scoring bid.

However, we need to look at the bigger picture. The real answer is for procurers to recognise the bidding capabilities of their preferred partners. If they want smaller companies, make the process simpler and more accessible for them. Perhaps by practising what they preach and working collaboratively with SMEs, they can create a procurement process which is less stressful and really focusses on delivering the best provider.

In the meantime, I shall spend my evenings wading through TQs...

Kathryn Potter



## ‘A STITCH IN TIME SAVES NINE’. OR, WHY BOTHER WITH A BID CONTENT LIBRARY?

**“A stitch in time saves nine” they say. For me that holds especially true for bids and proposals. So much time in the bid process is taken up by administrative tasks in the beginning and should be given over to review towards the end, that the actual writing should be one of the easy parts. At least if you have a working bid content library.**

If you have one of those, the bid content library thing, you should be able to save an enormous amount of time building a real first draft document. Not one of those ones where half the RAG status on the spreadsheet is red or maybe, at a push, amber. A real first draft should have chunks of text in place that can be tailored and tweaked, that can be updated, or added to, or deleted from. It shouldn't be a couple of bullet points and a note to contact Joe in Project Management, because there is nothing in the last several bids that looks remotely OK to put in as a starting block.

## THE BENEFIT

A comprehensive first draft makes tailoring better and easier and allows you to weave in golden threads, hot buttons, win themes or anything else you need to because the basis is solid. When I talk about a solid basis, I mean exactly that - a stand-alone piece (or pieces) of text that answers, “How do you deliver/provide/address Project Management?” (as an example) or whatever other standard sort of questions come up. I often hear that each bid is bespoke, and I do agree - but in theory all organisations have a standard way, particular to their business, of providing their products and services. While these may be tailored to focus on specific items to meet a customer's bespoke requirements, in general I'd be worried if you ran each implementation project differently or approached account management in another way for each client. Perhaps you have varying service levels - but that's exactly it - they are service levels and each is provided a certain way.

If this is the case - that there are repeatable processes and workflows that are followed for everything your organisation does - then it's a hop, skip and a jump to building a bid content library. You will save time and effort in the long run by spending the right time in the short run. I believe passionately in the abilities of each organisation's specialists to explain what they do and how they do it. They may not be the best writers, but they don't need to be. They need to be the best project managers, engineers, print-setters, train designers, lawyers or whatever it is that is their speciality. Our speciality as bid writers is creating bid responses using their knowledge.

So pick that one section of a response that eludes you every time (e.g. about how you deliver/provide/manufacture something) - the section that takes hours of trawling through every bid written to extract the key elements (and then worry you've missed something). Make an appointment with the Subject Matter Expert (SME) or Knowledge Owner (KO) who is responsible for that topic in your organisation and interview them. Find out what they do, how

they do it, why they do it and what the benefits are to the end customer and your organisation. Take notes, write up a ‘Guide to XYZ’ in sections that can be used individually in bids, get them to review it and approve it, share it with your team and see the stress melt away the next time that topic needs to be addressed - you have a first draft, now all you need to do is tweak it! (And do the same with the next topic and the next and the next!)

Then, don't forget to review it regularly with the SME/KO to make sure any new regulations or processes are included and it's still up-to-date. You'll also find they appreciate being able to share their expertise without the stress of having to write countless answers - or write at all, as writing is not everyone's strong suit.



Ben Hannon is Recruitment Director at Bid Solutions and has a track record of recruiting all levels of bid and proposal professionals. Having helped thousands of people progress in the bid and proposal profession, he knows what it takes to be successful.

Ben is APMP Certified and in addition to recruiting, he writes business-winning proposals and leads marketing communications across the Bid Solutions network.

Although they have worked together for seven years, Martin still had questions that needed answering...



## Q&A>

1. **How would you describe your job to a child?**  
I help people find work friends.
2. **What would your autobiography be called?**  
*'Coffee and To-Do Lists'*
3. **If you could steal credit for any great piece of art, song, film, book etc., which one would you claim?**  
I read that 'Happy Birthday' earns \$5000 every day in royalties and that it's technically illegal to sing it to large groups without permission, including office parties. I would choose this and hire a legal team to ensure I get what I'm owed.

4. **Guilty pleasure?**  
Eating pizza and watching Marvel movies.
5. **Single best tip for job seekers?**  
Have a good idea of exactly what you want in your next job. It can be difficult task to consider but it will help in the long run. Think about priorities and why you are searching for something new. It could come down to location, salary, personal development – whatever it is, keep it in mind when you are looking at vacancies, otherwise you will waste time on interviews and opportunities that aren't suitable.
6. **What profession would you most like to attempt other than yours?**  
Professional footballer – ludicrous amounts of money and it would mean that I would actually be good at football.
7. **What profession would you least like to attempt other than yours?**  
Donald Trump's toilet cleaner.
8. **What would you do with 15 minutes of fame?**  
I would try to create a positive impression that would open up new opportunities.
9. **You have been in the profession for almost eight years. What is the biggest change you have witnessed?**  
There are far more people getting into bids early on in their career, either straight out of university or as their second or third job. I think as bidding is becoming a more recognised (and understood) profession, it's become an attractive option for competitive young people that want to use their skills in a business winning environment.
10. **Biggest pet peeve?**  
When people email you and then call you straight away to tell you they've emailed you. Also, anyone whose default setting is 'aggressive'. I just don't get it.
11. **What types of hobbies do you enjoy outside of work?**  
I am a season ticket holder at Arsenal, which raises my stress levels. I'm also training for a half marathon, which reduces my stress levels. It's all about balance.



12. **What does true leadership mean to you?**  
Creating an environment where you can try something new without fear of getting it wrong.
13. **You speak to more people in the bid and proposal profession than I imagine anyone else in the country. How's the mood out there?**  
Generally pretty good. We'll see what happens when the Brexit button is finally pushed but it doesn't seem to have put off candidates seeking new jobs, or companies hiring new people.
14. **What three traits define you?**  
Resilience, loyalty, my beard.
15. **What's been your life's biggest lesson?**  
Not to take things personally.
16. **Best advice you have been given?**  
Health and family come first.
17. **If you could trade lives with anyone for a day who would it be and why?**  
Someone that lives stress free and just does whatever they want. Dan Bilzerian [American internet personality and gambler] or someone equally ridiculous.
18. **If heaven exists, what would you like to hear God say when you arrive at the pearly gates?**  
"Don't worry, you did well and the people you left behind will be just fine."

Jon Williams

## PASSIONATE ABOUT - PROPOSALS

I'm guessing we rather coined the phrase "passionate about proposals". It's been our corporate strapline for decades; it was the title of the book I published last year with my dear friend and colleague BJ Lownie. So, when I was asked "What are you passionate about right now in the bid and proposal world?" for this issue of BQ, my answer is fairly simple. "Proposals."



Let me explain. I moved from procurement to proposal management twenty years ago this summer, because I saw so many bidders struggling to produce compelling submissions. As someone who wrote outside work, and was well-trained in how evaluation teams operate and think, I saw a chance to develop my career along a new and more interesting path. (More seasoned readers may recall the famous TV series 'Boys from the Blackstuff' – set in my home city of Liverpool. I guess I was echoing the main character, Yosser Hughes: "Gis a job: I can do that!")

And I remain absolutely passionate about the role that proposals play in a great sales process – and frustrated by the way they're overlooked in so many bids.

There's the widespread job title 'bid manager'. Absolutely, that role's key. If you define the 'bid' as the end-to-end campaign to capture or retain a contract, then it encompasses a huge host of activities – which, of course, need some seriously skilled management. Understanding and working out how to best influence the client. Building the right team. Meetings

with the client's procurement team, business decision-makers and more. Detailed work designing the right solution. Cost modelling. Risk assessment. Demos. Site visits. Proofs of concept. Negotiations. Internal governance meetings.

Oh, and developing a brilliant proposal that's a joy to read.

See, if you're responsible for the overall campaign, I'd argue that – in most cases – it's very hard to also manage the proposal brilliantly. Time simply doesn't allow for you to lead both brilliantly at once, especially in that critical window when the document needs to be produced. And the skill sets are very different – yet I so often hear that (for example) "Our bid managers are OK at writing", as if 'good enough' is good enough to win in such a competitive world.

Or, worse, there's the line I heard from a sales lead recently: "The proposal doesn't matter. I'll ace it when I get to the pitch." Well, my friend, you may not even get to the pitch. And why wouldn't you want to "walk in as first of three, not as one of three", as an esteemed CEO once said to me.

Give me the same team, with the same solution and the same commercial model. Telling our story more powerfully and persuasively in the proposal will increase our scores in the evaluation, and hence improve our chances of winning business. It's "simples", as a meerkat or prime minister might say.

And the impact of getting this wrong? I've long argued that the proposal function is the job protection and creation engine for many companies. Did anyone see this BBC News item in February? "More than 450 jobs are at risk at a site belonging to one of the UK's largest meat processing companies". The reason: "We have been notified of a decision in respect of a tender process with a key customer. The outcome is not what we had expected and clearly we are all deeply disappointed by this news." How terribly, terribly sad for those affected – very possibly, because of a poor proposal?

Our research shows overwhelmingly that the bidder who comes out on top when the proposal is evaluated is likely to go on to win the deal – and that organisations that improve their proposal capabilities win more overall. Too many sales and bid teams focus too little on proposals.

And that's why I get so passionate about proposals.





Andy Haigh

## CONVINCING THE CLIENT

Imagine, for a moment, that you are in the Public Sector and it is getting towards the end of a difficult week. You get back from lunch to find a note on your desk to ring the boss. She says “We have had an evaluator for one of our tender competitions go sick. We need you to take over the work. The evaluation for the remaining three questions has to be done before you go home today!”

I expect your reaction would not be one of joy and happiness. For many people, critically reviewing tender responses is not a great way for them to use their time. Indeed, some would prefer to roll naked in a nettle bed rather than evaluate tenders!

Now imagine that in your review, you pick up one tender which has all the information laid out in the order you have in your check sheet. As you go through, you can pick up the evidence you need without having to dig through a pile of superlatives and unwanted “bonus” features.

In addition, you don’t need a copy of a dictionary beside you to work out what the obscure words mean, like the complicated words that come up in the other bids. You know that they have only been added to make the writer sound intelligent. You want to ignore them, but you have a legal duty to understand them!

Of course, you will only score the tender on the information which is presented. All the content must be tested against the scoring criteria. However, this response is on the cusp between a four or a five. Which do you give? It is likely that your emotional response to the ease of assessment will cut in and you will go for the higher mark.

Imagine, now, that you are a bid author. You enjoy your job and you are excited about what you have to offer. Indeed, you cannot wait to write down all the super things which your solution will do for the prospective client. You have a “brilliant and world beating solution, designed by your leading experts in the most innovative technology, which is not only trail-blazing but will be the benchmark for all future instantiations of icon alignment.” Somehow, your good idea for the layout of icons on the screen sounds so much more valuable and important – or does it?

Our job as bid professionals is to win our bids. It is not to display how clever we are to the evaluation team. Nor is it to market our products and services.



It is, only, to make selecting and buying our proposal easy, and easier than the competition. So why do we so often put barriers in the way of doing this?

Our suggestion is that the Bid Manager must brief the team to leave their egos at home and make it easy for the evaluator to evaluate. Each response they write should:

- Be ordered in the way the question is asked
- Follow a heading structure and layout that comes from deconstructing the question, before writing starts
- Not add any features which are not explicitly asked for
- Tested for comprehension against the Reading Ease and Grade tools built into the word processor

Then, when you get their first draft back, you should run Microsoft Word’s built in Readability Statistics. The Reading Ease score should be above 50. If it is not, send the draft back with instructions to make it easier to understand. And, just for fun, why not try the test on your last Executive Summary?

### BC THIS ARTICLE

- Flesch Reading Ease **70.5**
- Flesch-Kincaid Grade Level **7.3**
- Passive Sentences **0%**



*Peter McPartland*

## APPROACHING INNOVATION FROM THE PERSPECTIVE OF THE CLIENT

**It is very rare to work on a bid that doesn't require you to respond to questions focussed on innovation. When approaching these, we mustn't lose sight of the importance of thinking about innovation from the perspective of the organisation you are bidding to.**

The importance of innovation to evaluators appears to significantly outweigh that of continuous improvement. There are a number of obvious reasons for that. In today's markets, innovation is an area where buyers can see notable differences between bidders (unlike, for example, areas such as continuous improvement, service delivery and client care).

Also, as many clients see their own innovation vision and strategy as vital, the ability to identify those partners who will make a positive impact to that journey is a priority for them.

They are also looking to spot what is termed 'disruptive innovation' - in particular, thoughts on potential new business models and how they could lead to transformations in supply chains or create new markets.

Innovation is a high-profile area in many organisations now, which means we don't find it too difficult to articulate a view point on innovation - for example, where advancements in technology have been exploited and new concepts are being considered. When covering innovation, most of us can draw upon expertise from internal innovation departments and specialists within our own organisations.

Of course, innovation strategies and roadmaps are derived from imaginative thinking that is linked to making a positive customer impact. As bid managers, we must coach and challenge those closest to the client, and the innovation specialists who are supporting the bid, to present innovation from the perspective of the people we are bidding to.

### INNOVATION MUST BE OF VALUE

Let's not get too bogged down in defining innovation. True innovation is rare, but clients are often open minded and not overly prescriptive. I suspect there are very few of us that have been presented with a specific description to adhere to when concentrating on innovation that demands we only present what is unique, ground-breaking or pioneering.

Innovation goes beyond a step change in method with an element of originality. It must be useful and give rise to a positive outcome that is viewed as noteworthy. This is why we need to present responses covering innovation in a way that links the idea or concept to the achievement of what is important to the client. Like beauty, innovation is actually in the eye of the beholder. What one set of evaluators sees as relevant and making a difference may not be viewed in the same way by evaluators in a different organisation. There can be many reasons for that, so it is important that our pre-bid planning uncovers: what innovation looks like for the client; where they are in relation to innovation; how they see it potentially making a difference; and what is of most interest to them. Being in touch with where

competitors are focussing their efforts should also influence the approach to developing our response.

Such knowledge is vital in demonstrating how we can help the client in a way they have not heard of or thought of yet, on an area of genuine interest. The key is being able to confidently translate a vision and concepts into actual benefits and impact.

### DEMONSTRATING A COLLABORATIVE APPROACH TO INNOVATION

We should also take the opportunity to show how the leadership and culture of the organisation is fostering a long term commitment to innovation. The belief that great ideas are produced through an individual's flash of genius is a myth. The process of anything innovative must be collaborative.

Originality arises from the interplay of ideas and positive abrasion that occurs during interactions of people confident to offer their own points of view. We should not underestimate the strength in being able to clearly convey to evaluators our vision, what has influenced it and how a passion for thinking differently through collaboration goes beyond our organisation - and in particular extends to the client.



Holger Garden

# MOTIVATION FOR KNOWLEDGE SHARING AND THE LINK WITH MENTAL HEALTH

*"An investment in knowledge always pays the best interest."*  
Benjamin Franklin (1706 – 1790)

This statement is relevant in bidding for at least two reasons:

- We rely on knowledge sharing to realise all the dimensions of a proposal that convince procurement teams to say 'yes'
- Knowledge is power but only if the knowledge is shared for the benefit of all team members in the bid lifecycle, including to foster a sense of community in the workplace.

## KNOWLEDGE SHARING AND MENTAL HEALTH: MUTUALLY REINFORCING DRIVERS

For good mental health, people usually need to feel part of a community. One sign of community perception is our desire to share knowledge. A sense of community inspires us to share what we know, and sharing what we know helps to cement our role in the community.

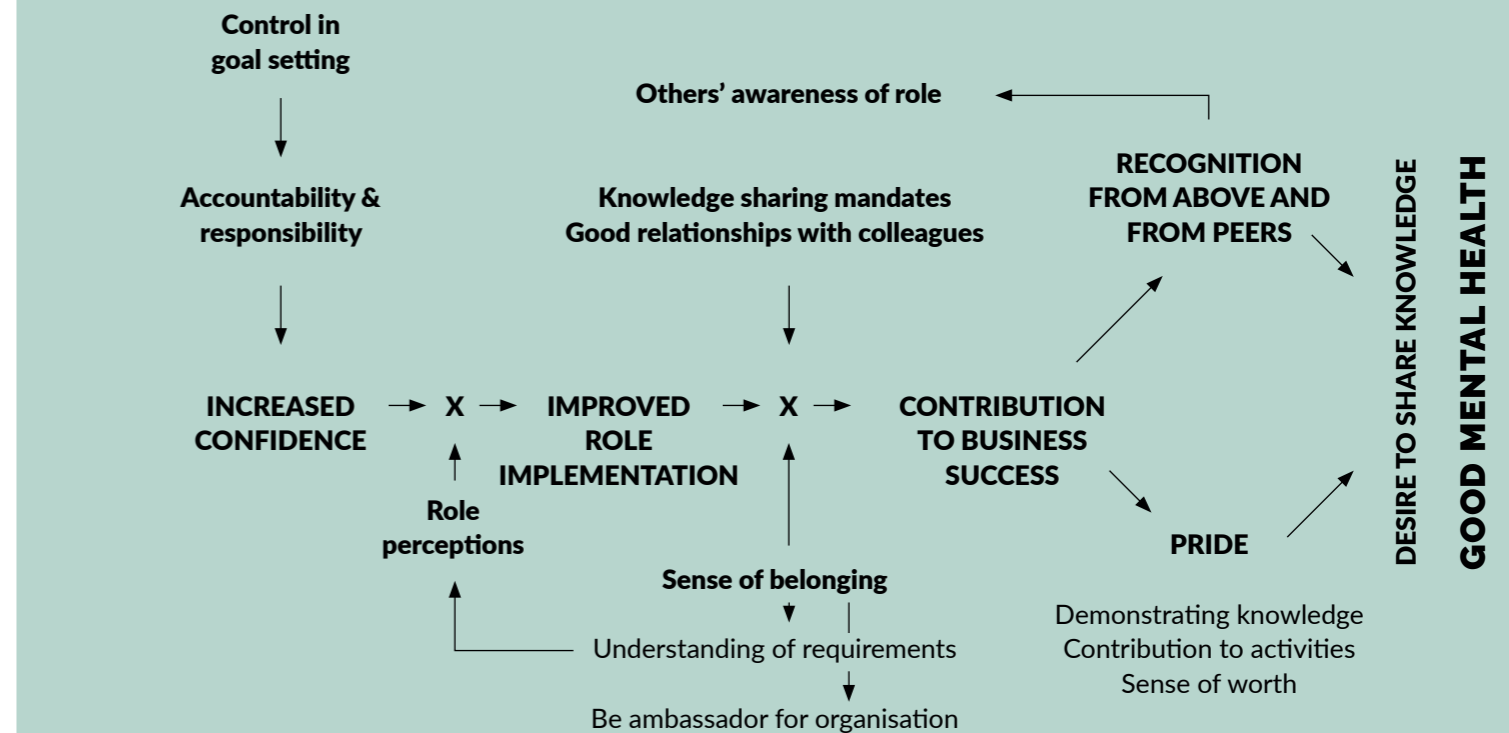
What is it about feeling part of a community that motivates us to share knowledge?

## TAKING A LEAD FROM PRACTICAL RESEARCH IN THE WORKPLACE

In a previous business development role, I researched motivation for knowledge sharing in a major UK construction company, using semi-structured interviews of junior, middle and senior managers – knowledge workers – including people working in bidding. My study was inspired by the principles of general workplace motivation. I banded knowledge sharing motivators according to the extent of their evidence as motivators: limited, moderate, medium, high and extensive.

## MOTIVATION BY INTRINSIC REWARDS AND A SENSE OF BELONGING

Nearly all the factors showing high and extensive evidence were intrinsic motivators, categorised under 'belonging', 'esteem' and 'self-actualisation' (fulfilment of talents and potential) factors. Intrinsic reward is also a key influencer of mental health, so there is a compound benefit to be gained by creating a work environment that stimulates intrinsic rewards.



**Figure 1: Critical elements of knowledge sharing motivation.** It's important to create a workplace that fosters contributions to business success, recognition from above and from peers, and a sense of pride.

Motivation by recognition and exercising competence: Respondents identified with others' awareness of their roles, reflecting recognition of position, status and contribution to the business. They expressed accountability and responsibility as motivators for knowledge sharing. These factors relate to demonstrating competence, an important requirement for knowledge workers. The Government's mental health first aid (MHFA) course also notes people's need to feel valued and recognised at work. One of my takeaways is that we must set up our approach to bidding to ensure team members' talents and competences are recognised and encouraged. Doing so will promote good mental health and will derive greatest benefits for bids from explicit and tacit knowledge.

## MOTIVATION BY PERSONAL PERFORMANCE

I found individuals' performance to be a key factor affecting job satisfaction, and that performance sustained motivated effort – the better we perform, the more we want to keep doing so.

The strongest motivators were personal performance and others' recognition of performance. In bids, we

must recognise the importance of making useful contributions for the success of the whole bid team, and for enabling team members to exercise their competences to create a sense of pride and worth.

## A CONCEPTUAL MODEL

Figure 1 is the conceptual model that I developed. It's important to create a work environment that promotes the factors shown in bold, also recognised by the MHFA training as some of the factors important for good mental health.

## WAS FRANKLIN RIGHT?

An investment in knowledge certainly does pay good interest, and we've recognised the importance since 1790 of moving workplaces forward to make them conducive to sharing knowledge and promoting good mental health. Franklin recognised that the wiser we are, the better decisions we'll make and the more things at which we'll be successful. We must make sure that all team members play their part in creating the best work environment. If we apply the motivators linked with intrinsic rewards, we'll be off to a good start.



**We all know the value of taking a proactive approach to sales and marketing strategy. But are you including proactive proposals in your thinking? A growing trend tells us sellers that use proposal skills earlier in their buyer interactions are reaping the rewards.**

Ten years ago, almost all of our business focused on conventional RFP and tender processes. Today, more than 25% of our projects involve helping clients in proactive sales processes. As well as writing proactive proposals, this includes producing branded collateral like handouts, invitations, slides, infographics and walk-through posters. These changing engagements reflect a wider transformation that's happening with some of our clients. But what triggered these changes?

Some of the answers can be found in the *The Challenger Sale*. Published in 2013, this excellent book analyses research from over 6,000 buyers. It concludes that the most effective sellers are those who challenge their customer's assumptions and methods. To do this, sellers need to truly understand their buyer's business and industry. And if they know this, the seller can control the conversation by sharing insights and making compelling suggestions. The book also highlights some other key trends:

- Buyers are going to market later in their purchasing processes and so the chances of winning the cold RFP or tender is lower than ever
- The involvement of more decision makers is a trend leading to 'the status quo' (i.e. no change) being the likely winner
- The biggest influence on long-term loyalty is driven from how the buyer is treated in the sales process

This is where the proactive proposal brings real value. Acting as a vehicle to articulate your insights, they influence the buyer's thinking. Done well they show the buyer you are serious about doing business with them. And it gives the 'coach' within the buyer something to share with other decision makers.

So smart sellers use a concise and impactful proactive proposal to gain a significant competitive advantage. But our white paper - 'How the Best Win' - shows us that only the top 5% of proposal organisations work with their sales colleagues to do this. Why is this? Perhaps proposal teams just aren't asked for their help. But if you are, fundamentally it's just like any proposal. It needs to tell a compelling story. Here's a suggested proposal structure that will help you build your own proactive proposal:

- A bespoke design that has a client-centric feel to it including covers with an active title
- A short foreword to say why you have provided this document and what they will read inside
- An executive summary structured to summarise your story, suggestions and why they need you
- Your recommendations - show you know the buyer and their market, what they should be doing and how you can help

- Commercials - the investment that the buyer will need to make, with the potential return
- Credentials - a short, tailored overview of your organisation slanted towards your story
- Next steps - a short concluding section with a clear set of follow-ups

In summary, an effective proactive proposal fits neatly within and is fully supportive of *The Challenger Sale* approach. Sales teams need the skills and experience of their proposals team, which will drive genuine competitive advantage for organisations willing to invest in proactive proposals.



Steve Robinson

## GETTING SALES AND BID ON THE SAME TRACK

**There is no more mesmerising example of teamwork than a track cycling team pursuit event; 4 riders in perfect harmony, travelling at 45mph centimetres from the rider in front, taking it in turns to hit the front, driving the group ever faster, then dropping to the back to recover before going again.**

But what has this got to do with bidding? We all know that teamwork is vital to success, and the bid world focuses heavily on collaboration to get the best result. But bids are heavily reliant upon customer insights that only sales can deliver, and I'd argue this is the area that most businesses are simply failing to get working properly.

To get back to my cycling analogy, it's as if we create a well-drilled squad of three track cyclists from the bid team, and then ask someone from sales to join us who turns up on their mountain

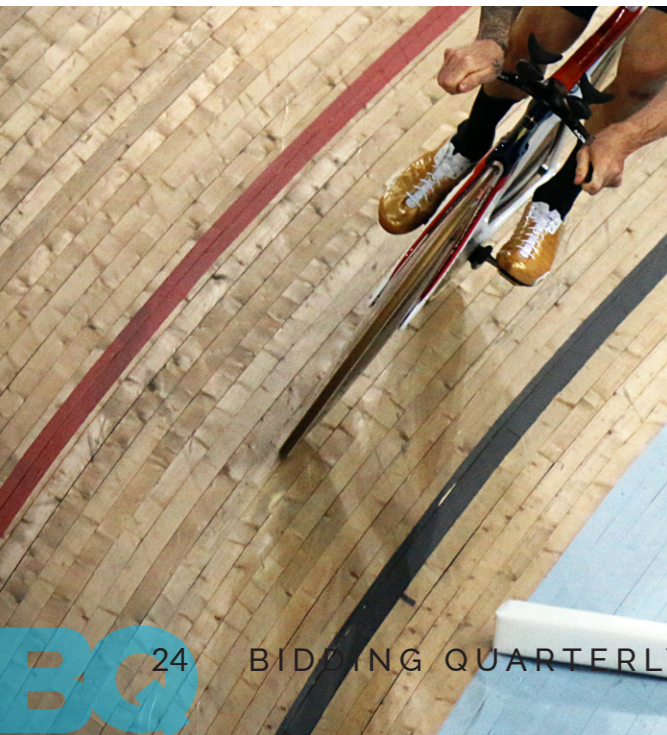
bike. They have many similar skills and enough fitness, but they simply aren't equipped to be that crucial 4th rider.

At the root of the problem is that both teams 'sort of' understand the other side's job, but neither fully gets it. Over the years I've heard salespeople dismiss bid functions as being merely admin, and I've heard bid functions dismiss sales as being people who promise the earth and then leave the bid team to it when the going gets tough.

Having been a salesman and sales trainer before spending the last decade with numerous amazing bid teams, I've truly seen both sides. But at heart, I'm still a salesman. And some of the behaviours I see from my own profession drive me to distraction.

I see salespeople throwing opportunities over the fence to bid and leaving them to get on with it; doing poor briefs and leaving bewildered bid experts to join the dots; and writing poor quality and generic executive summaries.

But, despite having seen bid teams try to intervene, these are issues they cannot fix alone. Successful selling takes far more skill and dedication than it is often given credit for, and any attempts from bid people to tell sales how to improve are routinely ignored.



So, we arrive at an impasse. Sales need to be better and up their game, and the bid team know this. But the bid team can't tell them how to do this, as sales probably won't listen to anyone without frontline sales experience.

The answer? Much like the track cycling team, it is all about training and more time working together until it gels. But to do this you can't rely on traditional sales training methods, as most sales trainers are almost always ex-salespeople and rarely understand the nuances of the bidding world any better than the salespeople do. What is needed is more bespoke and joint training that creates shared understanding and ownership. Sales need to be engaged on how crucial they are in the bid process, and bid teams need more understanding of the pressures sales face.

In every customer where we've aligned sales training with bid approaches and created joint workshops, we've seen astounding results. Greater sales ownership brings clearer messaging, better direction and greater customer insight. And good bid teams thrive off this.

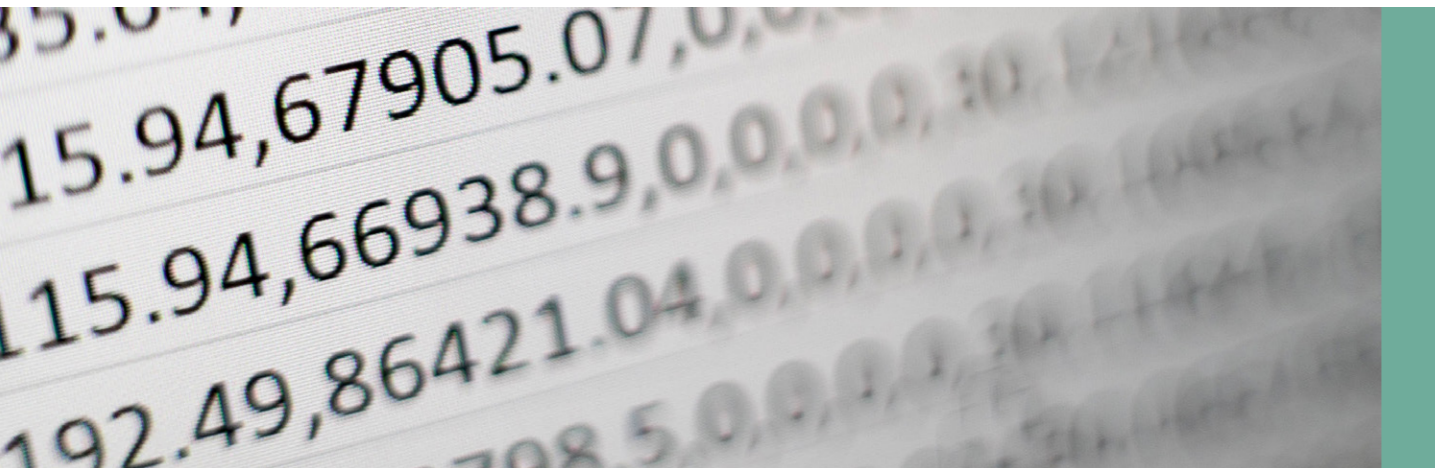
So, if you want to be more successful as a team don't think you can just tell sales how they need to step up. Plan how you will create events for both teams to come together to learn and improve, and mutually respect each other's abilities. This will help everybody gel and keep the team on track to success.

Peter Bryans



## THE PURSUIT OF PROFITABILITY

**The biggest passion in my bid and proposal world right now is the Excel modelling of profitability within a bid-price. This is not just about calculating the selling price to generate revenue, but also the estimation (and subtraction) of whole-life costs of delivery to understand likely 'end result' gross and net margins. Once constructed, such models can 'play tunes' to calibrate the prices offered to a customer and the likely end results of profits for the supplier.**



A particular challenge is trying to 'beat the clock' to get an offer out in response to a customer's request for proposal whilst ruminating on the likely profit margins when selling products or services at a certain price. Yes, the price would generate income, but would the extent of the income cover the consequential costs of delivery across people, processes, risk, inflation, Forex, third party suppliers, logistics, duties/taxes and overheads?

Making a profit from a selling price that will keep finance directorates happy at the point of sign off and offering a competitive price to a customer are not always one and the same. They often contradict each other and without detail, accuracy, agility and scrutiny this price vs profit debate can make sign-offs and the release of an approved price to a customer rather difficult.

All companies want to win large volumes of work and make large profits. In heavily competed tenders (usually the ones everyone wants to win), there can be difficult decisions to make between winning the work and making large profits. Of course, the idea is not to win any work that loses money, unless it is part of a longer term strategy or business case. The aim of modelling profitability is to predict and adjust a sell-price (for delivering a product or service to a customer within a contractual arrangement) and then report how much profit can be expected. As this is all calculated before the work commences, it is a 'best guess' and therefore inaccuracy is a considerable risk.

In terms of using Excel to calculate profitability, it is all well and good to estimate that the price is 100 and that the cost is 75 and, therefore, there is a profit margin of 25%. However, that 25% can never be realised if the price is unrealistic (in terms of what is contractually agreed with a customer and consequently invoiced) or if costs do not reflect the nature of the work to be delivered or if some cost items are missing (such as inflation, duties/taxes, Forex, indirect costs, corporate overheads, etc).

Furthermore, cashflow can mean that whilst the final profit is 25%, it will not be a month by month profit. There may be significant costs incurred at the beginning of the work (particularly in design and build projects), with revenues not being received until milestones have been reached.

Modelling profitability therefore has to be evidence-based and reconcilable to other completed projects or work that have actual management accounts and P&Ls. Scrutiny of these will, at least, ensure that all cost items have at been covered in the model. Actual costs from other work within the organisation can also provide a means of validation by adopting parametric and/or analogous estimating.

Parametrics is where parameters are drawn-up to gauge the cost of a product or service (e.g. £/hr, £/device, £/month). Once baseline values have been established from existing evidence, these can be applied to the profitability model or even used as inputs. Analogous estimating is when the total cost of a similar product or service is used on a pro-rata basis or used as a means to gauge the order of magnitude of a profitability model.

The best case is to model profitability as a repeatable standard procedure in bid pricing and then use these models to manage the accounts throughout the lifetime of the project. In essence, the profitability models are transferred into budgets that actual income and expenditure is tracked against. This way, variance analysis can be conducted in real-time and the lessons learned can be fed back to new models - setting optimism bias or improving the accuracy of model inputs, such as unit costs, people utilisation or volumes/types of activity employed. Over time the accuracy of profitability modelling increases and the models become a reliable tool.



# ABOUT OUR EXPERTS



GRAHAM ABLETT

## PROPOSAL MANAGEMENT & IT INDUSTRY EXPERT

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.



PETER BRYANS

## COSTING & PRICING EXPERT

Specialising in strategic cost modelling, estimating and pricing, Peter's 15 year career has seen him at Network Rail, Arup and Detica (now BAE Systems Applied Intelligence) and most recently in senior cost estimating and pricing roles at Aegis and Thales.



ANDREW HAIGH

## PUBLIC SECTOR BIDDING EXPERT

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

# ABOUT OUR EXPERTS



PIPPA BIRCH

## HIGHWAYS & CIVIL ENGINEERING EXPERT

Pippa has been a Bid Writer for over 15 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).



HOLGER GARDEN

## CONSTRUCTION EXPERT & PROFESSIONAL COACH

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.



BEN HANNON

## RECRUITMENT EXPERT

Ben is responsible for consistently providing long-term success for our clients in an increasingly competitive market. He understands the culture and winning mentality that ensures we stand out from the crowd.

# ABOUT OUR EXPERTS



NIGEL HUDSON

## PROFESSIONAL DEVELOPMENT EXPERT

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.



KATHRYN POTTER

## CONTENT EXPERT

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.



SIMON WELLSTEAD

## ADVERTISING & MARKETING EXPERT

SMSW Media is a creative & marketing agency with one focus - maximising revenue for its clients. Simon's early years working in blue-chip sales means he understands what it takes to grow. His dogged determination to challenge at all levels means that he can cut through the crap and unearth true value propositions.

# ABOUT OUR EXPERTS



PETER MCPARTLAND

## BID TEAM LEADERSHIP & INNOVATION

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.



MARTIN SMITH

## MANAGING DIRECTOR, BID SOLUTIONS

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



JON WILLIAMS

## PROPOSAL MANAGEMENT & APMP TRAINING EXPERT

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.

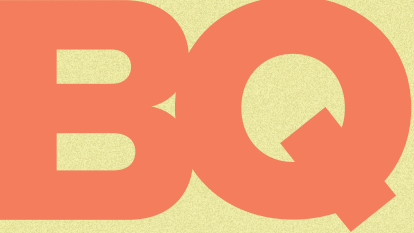


STEVE ROBINSON

## SALES ENGAGEMENT EXPERT

As CEO of Sales Engine, Steve has been privileged to spend the last eleven years working with numerous global brands, and myriad niche expert businesses, helping them to win contracts. He's never happier than when in a room full of energised and engaged sales and bid professionals, pen in hand, scribbling on a flip chart, dissecting what a customer really wants.





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