



BIDDING QUARTERLY

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Catch me if you can

Lifting the Lid on
Capture Management.



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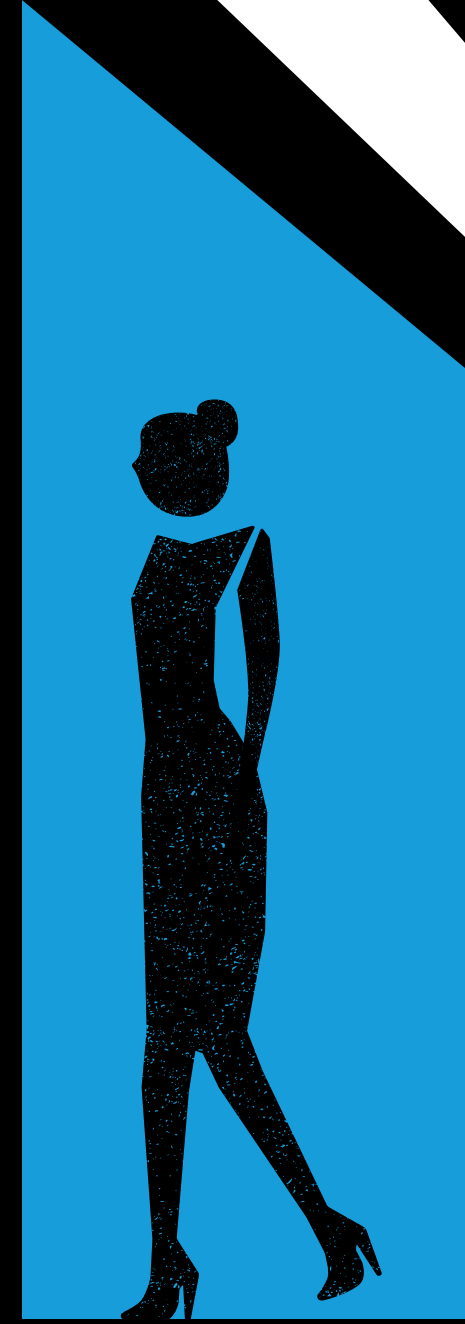
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INTRODUCTION

Capture Management is without question in vogue. It may have been enshrined in your sales process for years, or perhaps you are new to the concept and considering its merits? Either way, it's a pretty certain bet that one of your competitors is investing heavily in it right now.

At times I find Capture Management a tricky concept to pin down. I often feel it has an air of mystery surrounding it and despite 25 years in our profession, I still can't decide if it's a skill, a dedicated role, an entire function, or a combination of all three.

I have worked with some brilliant Capture Managers who have carved out entire careers, but equally I have worked with Bid Managers that simply treat it as one of their responsibilities as part of the bid process. As with most things in our profession, I don't believe there is a one-size-fits-all approach.

Whatever your view on Capture Management, there is no denying it can transform your ability to win business if the right approach is adopted. In Bidding Quarterly 8, our experts offer many different perspectives on how to generate maximum business benefit from its adoption. As well as fantastic contributions from our regular panel of experts, we have brilliant articles from several highly respected guest writers including Tony Birch, Steve Webster, Sarah Hinchliffe, Tim Snell and Jeremy Brim.

If Capture Management is near the top of your to-do list, I'm confident the opinions, advice and experiences our contributors openly share will accelerate your journey to developing a robust capability.

Martin Smith
Managing Director, Bid Solutions



Simon Wellstead

MARKETING IS CAPTURE MANAGEMENT'S BEST KEPT SECRET

"Never heard of it!"

That's what I said when Martin asked me to write an article on Capture Management a few months ago.

We weren't off to the best start.

But I'm only 75% embarrassed to admit this to you.

Because since then I've had a big realisation: Capture Management isn't a mystery to me at all. You could even say I do it every day. I just didn't know it.

You see, the more I learnt about Capture Management, the more it hit me that I've been calling it something else all along.

Marketing!

So here's my challenge: convincing you that Capture Management (at its best) and Marketing (at its best) are actually the same thing.

Let's dive in.

6 ways marketing mirrors Capture Management

As MD of performance marketing agency SMSW Media, I swear by a proven creative process to attract and win new business for clients. I might not use the words 'Capture Management' or 'pursuit and capture' to describe it, but the end goal is identical.

Here are 6 ways my marketing process mirrors Capture Management.

1. Hunting down opportunities

Decent marketers never wait for opportunities to fall into their laps. Instead, they predict, pre-empt and prepare. They hunt down potential and strategise how to win the race before it's even begun.

Sounds a lot like the fundamentals of pursuit and capture to me.

After locking-in on an opportunity, slick marketers scope it out to within an inch of its life. Key to this is gaining intense market knowledge, which leads me to my next example...

2. Scrutinising competitors

A winning edge is only achieved when you know where you stand, what you're up against, and how to get (and stay) ahead in your field.

Where your competitors are weak, you have strengths – strengths your customers are craving. But what are they? The best marketers will find out and shout about it every chance they get.

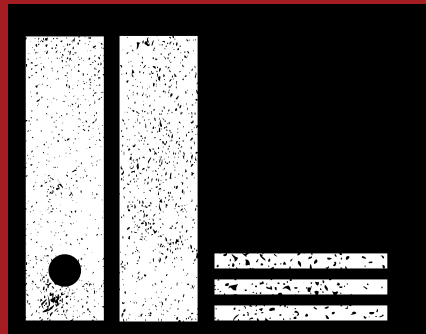
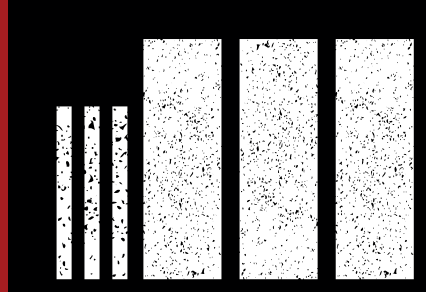
Capture leads know all about conquering competitors too.

3. Connecting with customers

No two ways about it: marketers have to know their audience inside out if they want to win them over.

At my agency, customer and decision maker profiling goes well beyond the basics – it reveals the real struggles, desires and shortfalls. It gets down to the nitty gritty of job roles, pains and gains.

I'm talking about deep-rooted, underlying factors that would have a transformative impact if noticed, a far cry from the typical answers your average procurement exercise throws up.



4. Brand discovery

“What makes you extraordinary?”

It's the first thing I ask during value proposition workshops.

I usually spend the next hour or two shooting down BS answers, repeating the words “nope, that's crap” and periodically crying into my flipchart paper.

But it's always okay in the end. Because I swear by a proven creative process that unearths the best of any business. It never fails to excavate the most compelling win themes, differentiators and brand stories.

My team and I can then create captivating value propositions and supporting positioning statements that hit directly on the customer's hot buttons.

From what I can see, these are all crucial components of Capture Management too.



5. Content creation

Marketers are (or should be!) masters of persuasive communication. They're also shit hot salespeople (or should be!).

They craft content and campaigns which are impossible for target clients to ignore.

Profiling insights and value prop themes get weaved together to create customised content that really hits home. The focus can then shift to delivering this at the perfect time across the most effective mix of channels.

In the bid world, I've found quick wins come from building creative campaigns around:

- Sales pipeline
- Sales wishlist
- Bid & proposal pipeline
- Customer retention strategy

Those of you in Capture Management surely do this too?

6. Strategy

In marketing, strategy is everything. All the intelligence and content from points 1-5 fuels a strategy that has purpose and can prove its worth in terms of the bottom line.

All marketers get asked “I spent £XXX, what did I get back?” at some point. And when the strategy and sales funnel are built, run and analysed to perfection – it's an easy answer. With revenue ROI to hand, we can justify our existence whenever we need to.

I bet strategy is just as key to Capture Management.

Simon Weltstead

CAPTURE MANAGEMENT VS. MARKETING VS. *MARKETING*

I'm aware that the marketing I've just described might not be the marketing you know.

And if not, I worry you might think I'm downplaying Capture Management. I promise you I'm not. It's actually the opposite. I want to highlight and celebrate the complexity and skills it takes to succeed in both roles.

I believe that a great pursuit and capture lead is already a great marketer. And vice versa.

But I hate to say it: in my experience, not all marketing teams are firing on all cylinders or covering all bases, especially when it comes to working with sales and bid teams.

And if the similarities I've run through here don't sound familiar, that will be why.

Maybe it's time to start asking questions.



3 MARKETING TRICKS CAPTURE MANAGEMENT IS MISSING

I've spoken a lot about the ways marketing mirrors Capture Management.

But in talking about that, it struck me that some aspects of marketing might be missing from Capture Management's playbook.

As a marketer, I have the benefit of specialist tools and ninja tactics at my fingertips. Not to mention a team of talented designers, strategists, advertisers, analysts and writers on tap.

Here are 3 of my favourite ways to win.



1. Magic funnels

Not actually magic but goddamn cool. The funnels we develop are like supercharged waterslides compared to most.

Advanced tracking and retargeting allows us to split audiences and trigger custom content sequences based on behavioural signals.

That's a posh way of saying we know exactly if, when and how potential clients are engaging. Which makes it much easier to read them and respond with content that's on time and in tune.

2. Power targeting

Did you know you can ring-fence a digital ad so only people within a specific building see it?

Using a trick even some experienced marketers don't know, we help clients reach their prospects by running an ad campaign that's only visible to people who work for the company you're targeting.

3. The advertising advantage

The mark of a great ad is its ability to hook a viewer, deliver a compelling message and drive an action. I don't see any reason why bids can't do the same.

With the right creative team behind you, dividers become billboards and pages become a space where stories spring to life. Black and white Word documents can't even begin to compete.

Kudos if you already have these covered. If not, consider implementing them in 2020. I'd be happy to help show you how.

Tony Birch

CUSTOMERS APPRECIATE CAPTURE PLANNING - WHEN IT'S DONE RIGHT!

Without necessarily knowing what it is, customer organisations appreciate sellers that practice capture planning because, to them, it means that potential suppliers are taking the time to interact with them to understand their needs.

From the perspective of the organisation that is trying to sell its goods and services, capture planning is the process of identifying appropriate business opportunities, assessing the competitive environment, then developing and managing the implementation of winning strategies orientated towards capturing a specific business opportunity.

Identifying appropriate business opportunities

Capture planning is essential when you are seeking to win complex business from complex customers, in complex competitive situations. The more complex the situation, the more capture planning is appropriate. If you have a prospective customer that knows exactly what they want to buy and what you have to sell is an “off-the-shelf” product or service, then capture planning is less appropriate.

Complex business is rarely won by a single individual although sometimes this can be the case. Mostly, complex business is won by a multi-disciplined team of people working together towards the common goal of winning the business. A typical capture team will comprise of a person in the sales role and relevant solutions developers – with commercial, technical and programme competence, as appropriate.

The decision to pursue a piece of business should not be taken lightly. If you are going to spend time and money trying to win some business, the least you can do is work out why, and how, you are going to win.

Assessing the competitive environment

The first stage of the capture planning process is to assess the competitive environment. This must always be undertaken in an ethical manner. It involves gaining a thorough understanding of the prospective customer, their needs and expectations. At the same time, it is necessary to ensure that you understand the competitive situation. The earlier that you undertake this activity, the more likely it is to be successful.

The easiest way to gain an understanding of the customer is to interact with them. This involves meeting with people at all levels of the prospective customer organisation, from users to decision makers. During this activity it is really important to listen to them and confirm your understanding of what they are looking to buy. If what you are offering is not likely to meet their expectations and/or you cannot adapt your offerings to be compliant, now is the time to make the difficult decision to not pursue the opportunity any further.

Achieving an understanding of the competition can be more demanding. It is really important that you understand the prospective customer's perception of any competing solutions to your offerings. During the rest of the sales process, as well as in any bid documents or presentations, your winning strategies will rely on this knowledge.

Developing and managing the implementation of winning strategies

Successful capture planning requires written, action-orientated capture plans. A capture plan is a description of a “project” that takes place before the contract is won. The desired outcome of the project is winning the contract and then delivering it successfully for the customer. The project manager for the capture plan is the capture manager.

In some organisations the role of the capture manager is customer facing and in some they are not. Where they are not, there is a person in a sales role. Both seem to work well, as long as the responsibilities of the people in each of the roles is clear. It is the capture manager’s responsibility to make sure that the team involved in the sale is supported and does not lose sight of the goal.

A capture plan should contain a detailed assessment of the competitive environment and clearly documented strategy and tactics – in the form of real SMART actions. A capture plan is a dynamic document. The impacts of the actions must be assessed and adapted if necessary. Finally, it must be reviewed regularly, by appropriately knowledgeable people.



**CAPTURE PLANNING IS NOTHING NEW.
SUCCESSFUL SALES ORGANISATIONS HAVE
BEEN DOING IT FOR YEARS.**

Nigel Hudson

GO FISHIN'

You may not know it, but I'm better known as an angler than a bidder. I've written several fishing books, I edit an angling magazine, and have spent more than forty years chasing fish only to put them back once I've caught them. What is the point of all this? It is because, as John Buchan wrote, "The charm of fishing is that it is the pursuit of what is elusive but attainable, a perpetual series of occasions for hope." Hence why I see parallels between fishing and bidding – especially 'capture' which is designed to influence the fish (or customer) to take our bait. So, with my small but enticingly juicy worm a-dangling, I'd like to share some observations with you.

Famous angler Richard Walker described what became known as 'the angling career'. It goes like this: "When someone takes up fishing, all they want to do is catch a fish, any fish. This eventually happens, more by luck than design. Then, spurred by success, they want to catch another fish, then lots of fish. As their experience and confidence grows, they might choose to target a specific species of fish. When they've mastered the skills needed to catch that species, they might aspire to catch a bigger fish, then an even bigger one, and then the biggest fish (which is likely to be the oldest, wisest, and hardest to catch). They might even become 'super specialist' and seek to catch the biggest of each species in every pond, river or sea. Eventually, when they've mastered their craft and are content with everything they've achieved, they will inevitably take pleasure in helping others to catch fish."

How does this compare to your career as a bidder? Are you just starting out, looking for your first win? Are you aspiring to win more? Are you specialising in a specific area of bidding? Are you a seasoned expert pursuing the biggest 'catch of a lifetime' deal? Maybe you've captured enough and now find most pleasure, as I do, in helping others to succeed?

In bidding, as with angling, there's no fast track to success. We have to "study to be quiet" as Izaak Walton (author of *The Compleat Angler*) said, completing our apprenticeship then practising our skills before we can become the calm, swan-like master. There's no universal formula for success other than doing everything we can to understand and entice our target customer. How do anglers do this? They learn the habits and preferences of the individual fish – where it will be at any time of day or night, in different weather conditions and at different times of year; on what bait or tactic it is likely to be caught (including what tactics have succeeded or failed in the past); and what tackle is needed to effectively 'deliver' the fish to the net. Then they ensure they're in the right place at the right time, presenting something that they know the fish will like, while not doing anything that will cause alarm. Then it's a matter of waiting and hoping – for a bite and tussle before the capture is made.

The very best anglers, as with bidders, need to be goal-focused, 'patiently impatient', always learning (being obsessed with every detail involved in 'getting it right'), energised but irritated by failure (when the fish refuses to bite, or escapes during battle, which forces them to rethink their strategy); and absolutely, passionately, life-

IF YOU WANNA CATCH A FISH...

definingly addicted to the pleasures of the chase and the rush of success, ultimately having confidence in their abilities, knowing that 'good things come to those who initiate'.

Thankfully for us, bidding is much easier than fishing. Why? Because people buy from people. Human behaviour is far easier to fathom than attempting to get inside the mind of a fish. Procurement people aren't that different to bidders, they still go home and enjoy their hobbies - though, like Dr Samuel Johnson, they might consider fishing to be "a worm at one end and a fool at the other". I wonder, with bidding, who is the worm and who is the fool? I'd prefer to think that 'capture' isn't about fooling anyone. As American fly fishing author John Gierach wrote, "Creeps and idiots cannot conceal themselves for long on a fishing trip." Better, then, to be caught than caught out.

Capture what you will from this. But remember the old rule: if you wanna catch fish, you gotta go fishin'.





Graham Ablett

EFFECTIVE RENEWAL STRATEGIES

For too many sales and account teams, developing proposals is a largely reactive task – waiting for the RFP or Tender to land and then furiously scurrying around to get a response out of the door. Too few take advantage of the pre-proposal or ‘capture’ phase and don’t use it to gain competitive advantage. This includes incumbents - our research shows us that only 10% of account teams have a defined process for renewals.

An opportunity missed

Buyers are almost 60% of their way through their purchasing cycle when they issue an RFP¹. As you can see from the typical sourcing process opposite, this means that there are lots of opportunities for influencing your customer before they go to market.

Aside from the obvious work that can be done during the pre-RFP phase, here’s what the best incumbents gather:

- A clear picture of how your customer is spending and has spent with you
- Information on other accounts where similar customers are getting better outcomes
- An estimate of the cost of changing from you to another provider
- The value that you have delivered to date to your customer

As well as being able to remind them of the great work you’ve done so far, gathering this information will help you:

- Clearly articulate the risk in moving away from you
- Identify opportunities for you to offer more value to your customer
- Show them you have insights on them and others
- Demonstrate the value they get from doing business with you

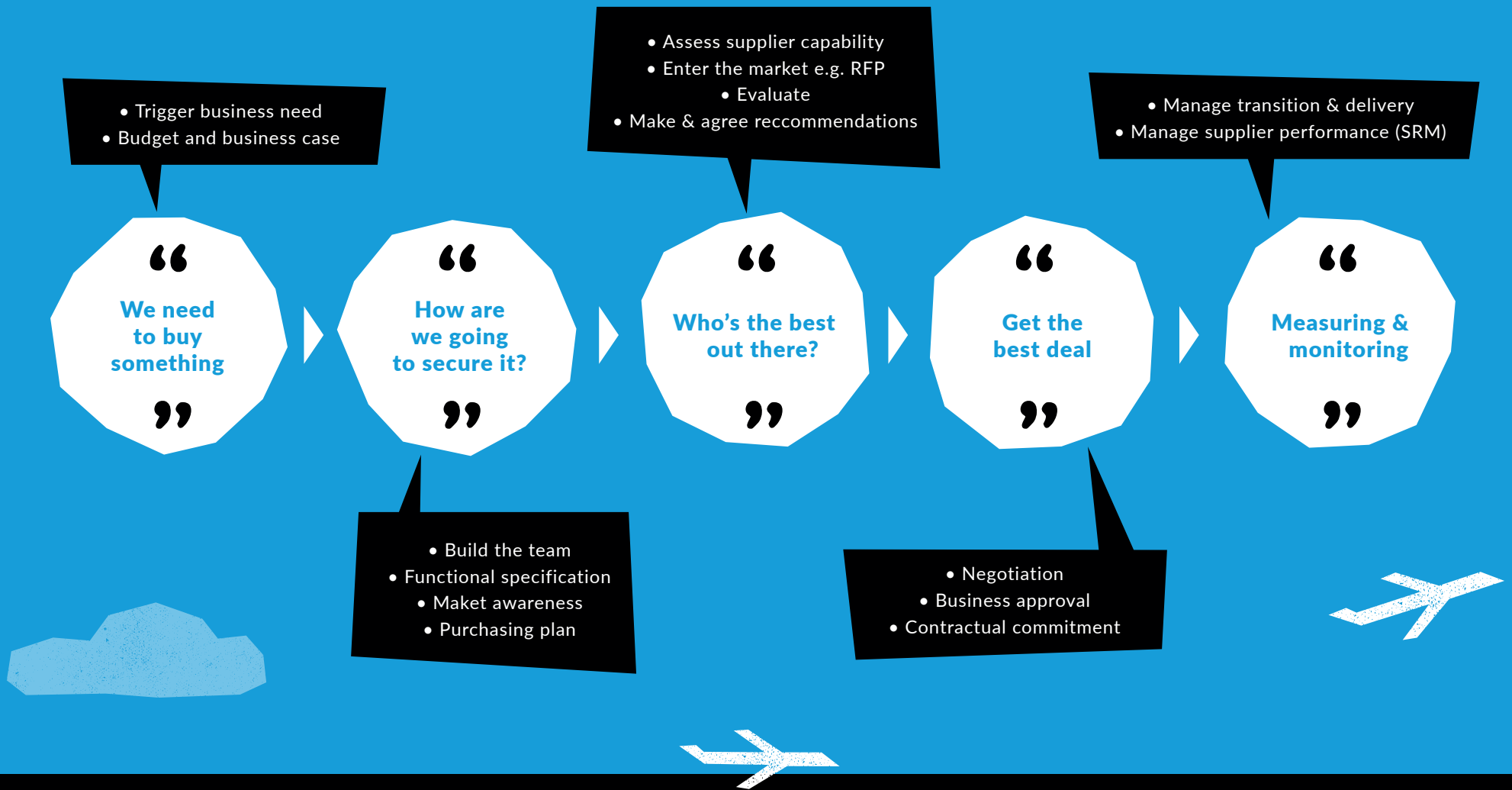
¹ According to research presented in *The Challenger Sale: How to Take Control of the Customer Conversation*, Adamson, B and Dixon, M (2013)



TOO MANY SALES TEAMS WAIT FOR A TENDER TO LAND



THE TYPICAL SOURCING PROCESS...



Graham Ablett

GOING FURTHER...

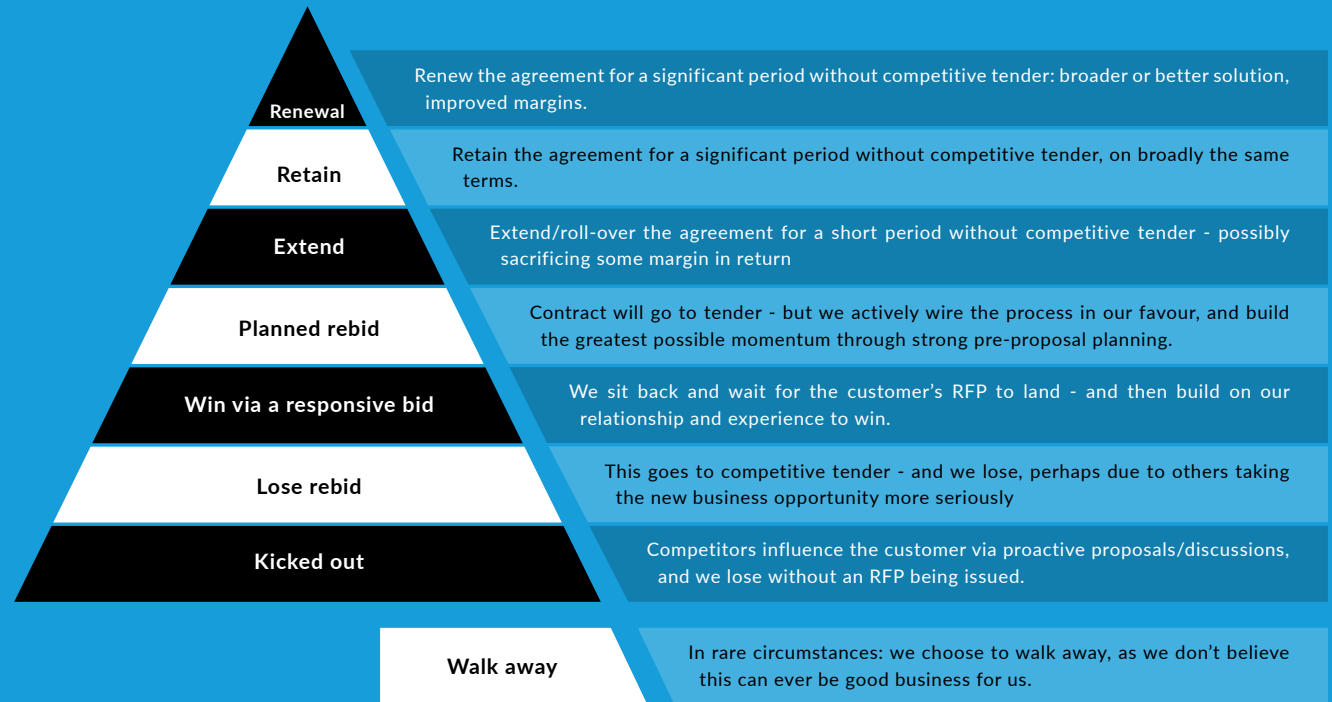
Why not do what many fail to do and use the pre-RFP time to really get on the front foot and develop a proactive renewal proposal that asks your customer to re-award you with their business? As our research shows, many buyers would consider extending an incumbent's contract if they did this.

Renewal proposals are effective

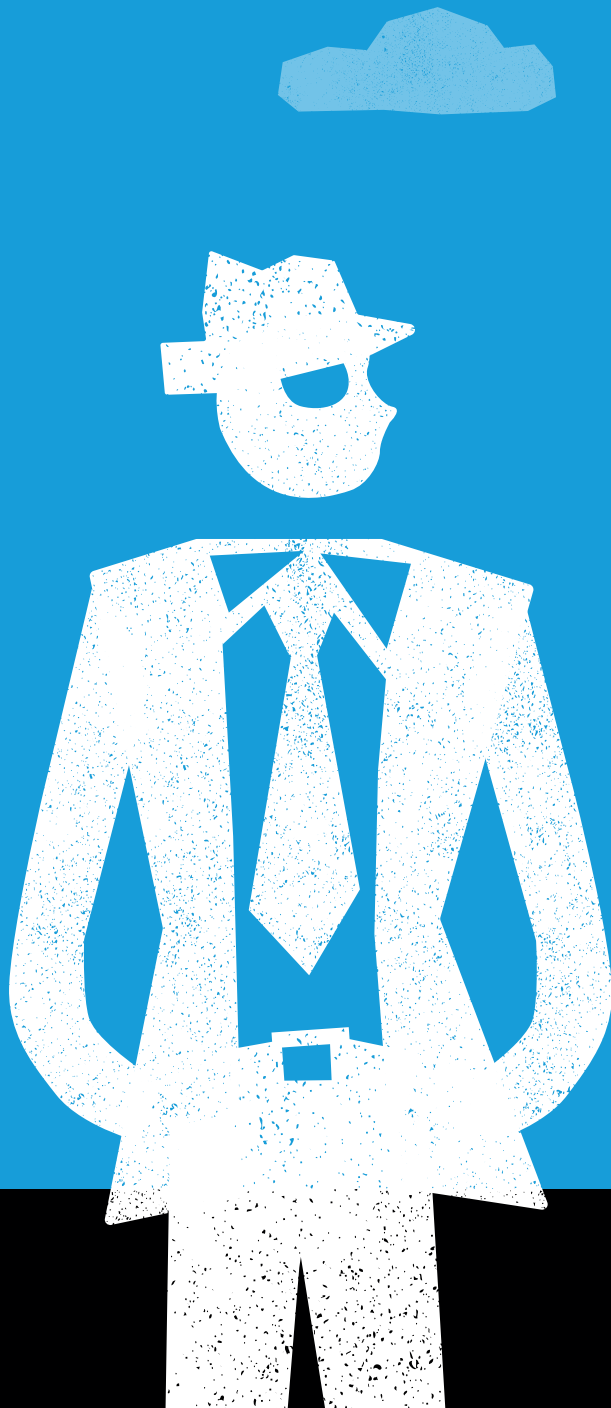
Almost 75% would consider extending the contract of an incumbent supplier if they sent them a great proposal before the start of a formal procurement process.

How to define your own renewal strategy

Let us introduce you to the pyramid of renewal doom – our tried-and-tested approach. This shows you all the renewal paths available for you to choose from, including some you might want to avoid:



So, the first thing for you to do is assess which of these paths will deliver the result that you can realistically achieve. Then build a renewal plan to deliver that strategy including: a story, a contact plan, solution development and commercial workstreams. And then work out which deliverables you need to produce along the way.



How the proposal team helps deliver the renewal strategy
Each renewal strategy will require several deliverables. This is where the proposal team can use its skills and experience to help. Some examples we've used on very successful renewals include:

- Producing a Value Report to remind the customer of successes so far – delivered as a piece of account management collateral and used to influence retaining your services
- Generating proactive renewal proposals and presentations that articulate your compelling renewal story and influencing your customer
- Innovation workshops where you present ideas on different and new approaches that your customer could adopt to achieve further improvements
- Offering to write the RFP for your customer, wired in your favour of course (and creating your answers at the same time)

What benefits can you expect from running effective renewal strategies?

We recently ran a workshop to coach senior account directors on how to use the pyramid of renewal doom and develop effective renewal strategies. This formed part of our client's programme to improve their interactions with their top 100 clients. The sessions gained amazing feedback and have already resulted in three successful renewals worth in excess of £50m revenue.

In summary

Developing proactive renewal strategies maximises retentions. To do this, use the pyramid of renewal doom to help define your strategy for each opportunity. Aim high – target achieving a better deal for you and your customer and start preparing early. Then build a plan that influences your customer using some of the methods described here. Done well, you'll be gaining competitive advantage and be better than the Challenger Sale statistic that says incumbents only win 48% of the time. Good luck!

**THE SESSIONS HAVE RESULTED
IN RENEWALS WORTH IN EXCESS
OF £50M REVENUE**



Andy Haigh

THE IDEAL CLIENT!

For us, Capture Management is all about finding out who looks like they will be a good client, uncovering what they really need and then working out how we can give it to them better than anyone else. If we can get this right, writing the bid is a complete doddle!

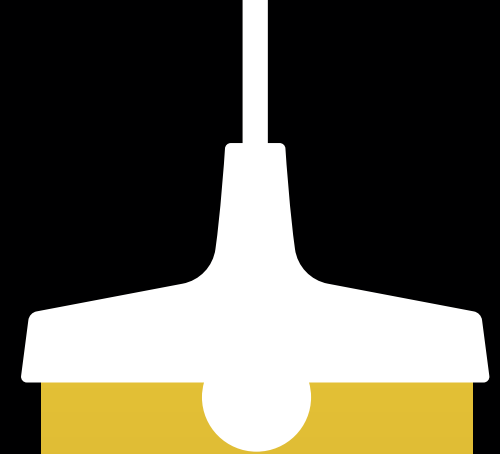
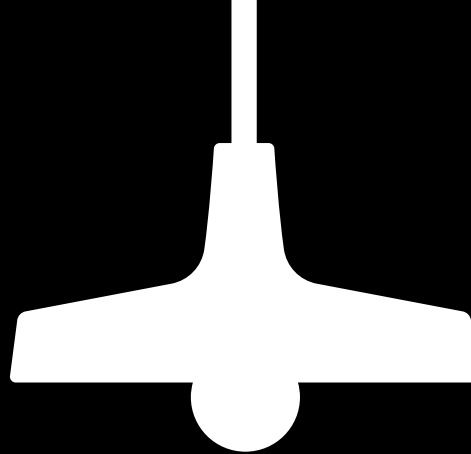
Of course, you can swan around and get a list of likely prospects, research them and then send them a proposal. Generally, you will have more success if you do these steps in this order! We have come across some organisations who start from the back end and don't do so well. We have, however, discovered there is a much better way.

We start our Capture Management activity with a session we call "The Ideal Client". It is a fun brainstorming session to which you need to invite a full spectrum of disciplines within your business. Get them together, put a pile of sugary buns in the middle of the table and brainstorm all the attributes a client would need to have to be absolutely the best for your business.

Get everyone involved and get as many wacky ideas as you can. Then consolidate the list to the most sensible and important ideas. Your final list might include companies which:

- Pay what is due on time
- Are headquartered close to our business
- Use a compatible technology
- Have high ethical standards
- Have a good reputation in the marketplace
- Do not have a good solution for the problem we are really good at fixing
- Have staff numbers over 100 but fewer than 500
- Are desperate to increase market share
- Have a business similar to the most successful of our existing clients

Think of everything that would make a client superb to deal with from your perspective. Don't temper this list with the experience of your existing client business.



When this is done, we know that if a potential client could meet all of these ideal points, we would already be trading with them – wouldn't we? But nothing is as simple as this and no potential client on our list is likely to meet all the things we are seeking.

So, the next step is to take the list of prospects you have already got together and test them against our Ideal Client profile. We normally put together a matrix and score each target client as High, Medium or Low against each attribute. Of course, you could use a 0 to 5 scale and weight each attribute with its relative importance to you. Either way, you should be able to quickly get a shortlist of the very best prospects. Pick the top three or five and go on to the next step.

Does this sound familiar? It should do if you have ever bid for Government business. In essence, this is the process the Public Sector uses to decide which bid will win. We use the same approach to find out which prospects to go after. And it works.

All you have to do now is the research and then put together a communication plan including:

1. Who is the right person in the prospect's business to contact first?
2. Who will make that contact?
3. What will they say that will "bowl the prospect over"?

We have a way of doing this too, based on the approach set out in *Selling to VITO* by Anthony Parinello. This is a brilliant way to work out what you can do for a client and then get their senior staff to want to talk to you about it. When this all works, you might find you are given the business without having to put in a bid at all!

Ultimately, we think that Capture Management is all about the client. If we can really understand their problems from their perspective and we think we have the best solution to solve those problems, the rest of the sales process should be easy. We can try and be clever and sell what we have, irrespective of whether this is the best solution for them – but we don't believe this leads to a sustainable business for us. We prefer to be valued by our clients for what we can do to help them, which will come down to us having just what they need at the moment they need it. We need to pick the very best of the spectrum of potential clients and make sure our business really works for them. We need to capture the best and deliver our best to them.

**WE NEED TO CAPTURE
THE BEST AND DELIVER
OUR BEST TO THEM.**



Holger Garden

SPOTLIGHT

Holger is an independent bid consultant who spends most of his time working in his beloved field of civil engineering. He supports clients' infrastructure bids in the sectors of rail, utilities, highways, defence, energy from waste, nuclear, aviation, and security. We at Bid Solutions know Holger well but we still had some questions that we fancied asking him to find out a bit more about what makes him tick.

1. Greatest achievement personally?

Non-work: Reaching the summit of Mount Kilimanjaro.
Work: Starting my business from nothing and gaining client traction within one month.

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

This question reminds me of a conversation in a lecture at university:

Fellow student: "Will you be giving us notes for this session?"

Lecturer: "Sure, you can have all the notes you'll ever need; you'll find them in the library."

I don't subscribe to that approach, but I did take away a useful lesson all those years ago: we were being encouraged to teach ourselves and find information independently as part of managing our learning and development. That's one of the greatest gifts we all have. Tenacity in learning always pays off.

3. Biggest pet hate?

Non-work: Drivers who cruise in the overtaking lanes instead of looking like they mean business!

Work: Long ways of writing short messages, e.g. 'Prior to the commencement of...' instead of 'Before starting...'

4. Guilty pleasure?

Coffee. I know I drink too much of it. Let's not forget cheesecake, particularly with the biscuit base.

5. Describe yourself in three words.

Curious every day.

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

Slow down; it'll make you go faster. The 18-year-old Holger didn't realise that preparation pays off. He wanted to do everything by launching himself into it headfirst. He often didn't get very far or at any great speed because he spent too much time correcting mistakes.

7. What was your dream job growing up?

As a kid I fancied my chances in space research. I wrote to Sir Patrick Moore to learn about researching the sky at night. He was kind enough to reply every time. Later, civil engineering grabbed my interest when I saw a picture of an engineer at the top of a tower of the Humber suspension bridge on the cover of a careers prospectus.

8. What questions are you asking yourself?

Many, about work and life. In the past week alone, I've had conversations that led me to ask:

- What have I learned today and what difference will that make to how I do things?

- What am I doing to maintain my own happiness and to make an impact on other people?
- Is there another human-populated planet in the Universe? To this day, I'm still fascinated by space and what 'neighbours' we might have. I think interpreting signals from our own and other galaxies must be an amazing job.

9. One thing you'd like to do better?

Play the guitar. I've had several goes over the years at teaching myself and being taught, and I managed to get as far as playing the 12-bar blues. I've regressed back to square one and, just to make it all or nothing, the practice ahead will now be more challenging because I'd like to learn slide guitar as well.

10. If you won the lottery, what would be your first indulgence?

After composing myself and calming down, I'd indulge in the genuine thrill of thinking about how to put my new fortune to use for family, friends and good causes. I'd absolutely love to be in a position to give huge amounts to charities, including for mental health, poverty, heart and lung health, cancer, homelessness, and support for veterans. I'd quite fancy a classic car for taking to summer shows. I'd choose from my favourites, which include a 1961 Jaguar E-Type, 1965 Aston Martin DB5, 1977 Lotus Esprit and 1969 Dodge Charger.

They're not practical or environmentally acceptable for day-to-day use, but they'd be great fun for the occasional spin. I learned recently that it's now a thing to electrify classic cars. How great is that!

11. Favourite pastimes?

I'm lucky enough to live in the Chilterns, so you'll find me on long walks in the country or cobweb-clearing rides on my bike at the weekends, always involving a pub stop; the Royal Standard of England is my favourite. I enjoy DIY, particularly making anything from wood; my latest project was a summerhouse from scratch. Reading a David Baldacci thriller is a great way to lose myself in the moment for relaxation. I find that a challenging weights session at the gym is another great way to think about nothing but what's happening at the time.

12. Most important lesson for life in general?

There's no such thing as self-made success. We all achieve everything with the support of others, even if we're the conductors of the orchestra, so to speak, and even if we have to put in the hours. The support from other people might be moral, physical, mental, specialist skills, etc. It's important to remember who's helped us on the way because there's no greater joy than being able to reciprocate people's kindness.

13. What's precious to you?

Top of the list are my health, family and friends. Then come the things that should never be wasted, the top five of which for me are time, food, opportunities to help others, opportunities to embrace diversity and money. Some people will testify that I'm embarrassing because I ask for my food to be wrapped for taking home if I can't finish a meal out. That scenario arises rarely because food is such a joy. I'm against food waste because it's a sad fact that a lot of people worldwide don't have enough of it.

14. What advice do you have for newbies in the bid profession?

Resist the temptation to take things at face value. Probe deeper for the golden nuggets that will help you win the day. Remember the most important question in bidding: 'So what?' to frame what matters most to the client.

**THEY'RE NOT
PRACTICAL...**

**...BUT THEY'RE
GREAT!**



Steve Webster

ONE SIZE DOESN'T FIT ALL!

A new acquaintance recently asked, “What do you do?” I responded by introducing myself as a ‘Pursuit and Capture Practitioner’. This left my new friend puzzled. To the uninitiated, I suspect ‘Pursuit’ recalls American cop car chases (‘10:4 in hot pursuit’) and ‘Capture’ as military exploits to seize enemy strongholds. Sensing confusion building, I quickly opted for a simpler explanation: “Helping our sales teams win more business.” From their body language, I saw this explanation made more sense. We both relaxed and continued our introductions.

Upon reflection, perhaps confusion was a natural response. Using two powerful nouns with strong associations with police and military is not helpful for a profession that prides itself on winning business using words and persuasion.

When asked to describe my experience of Capture for Bidding Quarterly, my response is that Capture is undoubtedly the most exciting and rewarding of the many steps necessary to acquire a new customer. But why? Is it because it's early in the pursuit cycle and everyone likes to be involved in setting the strategy?

My excitement comes from witnessing the emergence of a competitive sales strategy, seemingly from an assortment of unconnected inputs, facts and opinions. When you strike Capture gold, this can be a beautiful experience to be part of. Knowing that, as a team, you've discovered things about your organisation that no other bidder can offer is both energising and exhilarating.

Positivity and togetherness rain down on the pursuit team after a successful Capture session. Deeper relationships and respect between the Capture Team and Sales Teams are formed as both see each other as worthy contributors towards a common goal. Perhaps this is our industry's equivalent of a one-two pass round your opponent before scoring the winning goal or jamming out a catchy tune with your band mates that goes on to be the band's defining No. 1 single.

But how best to describe successful Capture? Increased win rates, pursuit team efficiency, shorter pursuit cycles, closer alignment to the prospect's desired outcomes? While these are important measures of successful Capture, the answer doesn't simply lie here.

Capture can only be considered truly successful if it operates in complete harmony with the organisation it seeks to serve. Harmony means recognition of Capture as a highly valued (and demanded) activity by the sales organisation. It requires the participation of the organisation's most creative and innovative thought leaders in developing Capture strategies that unlock real competitive advantage. It also includes support functions in strategy discussions and development. Support functions are frequently underplayed as 'just' back office support, but they (like proposal teams) are subject matter experts. Delivery teams also enrich the strategy by seeding key differentiators and client proof points and are instrumental in persuading the prospect long after the initial sales pitch is over.

Approaches to Capture vary greatly internationally, by industry sector and by maturity of business development practices. Variations range from arbitrary strategy-based conversations, to discretionary, one-off win strategy workshops, to robust Capture procedures integrated into proposal development cycles facilitated by dedicated Capture Managers.

But what is right for one organisation isn't necessary effective for another. It is key to develop a form of Capture that reflects your organisation's appetite to strategise relevant to deal size, complexity and the competitive landscape in which your organisation operates.

APPROACHES TO CAPTURE VARY GREATLY INTERNATIONALLY



If you are introducing capture to your organisation for the first time or transforming your existing capture processes for greater effectiveness, these points may be useful in developing a unique capture style:

- 1** Consider assessing your business development practices to identify optimal capture techniques, skills and process development ideas. The Business Development Institute International (BD-Institute) provides a useful Capability Maturity Model® for Business Development baselining. <https://bd-institute.org/about-us/>
- 2** How does your organisation harness its competitive edge? Who are the creative thinkers, the shakers and movers in your organisation who can enrich a sales strategy? How can you design a capture process that frequently taps into their collective intellect without disrupting their day to day job?
- 3** Assess how to crowd-source account and competitor intelligence. These inputs open up valuable new thinking and approaches beyond the standard sales plays.
- 4** Harness 'the art of the possible'. Capture sessions excel when everyone feels safe and encouraged into contributing to the strategy discussion. Think the unthinkable. Where organisations operate in highly competitive markets, any competitive advantage (however small) can help increase your overall probability of success.
- 5** Consider capture as a practice and develop an identity around it. If possible, brand it with a memorable name, so that people recognise and promote it.
- 6** Find supporters within the sales team who can act as your advocates on the value of capture and help drive the word to doubtful colleagues. Look for an executive sponsor too, someone to push down their support while you drive the reputation of capture up the organisation
- 7** Ensure capture output is conclusive with a defined direction. Consider formalising your sales approach using strategies applied to complex enterprise selling (Frontal, Fragmented, Flanking, Develop and Defensive). A good article on this approach is published by Tony J. Hughes, IQ Global <https://www.linkedin.com/pulse/4-competitive-strategies-tony-j.-hughes/>

Jon Williams

IN PRAISE OF PRE-PROPOSAL PLANNING

“Ah”, they murmur: “Writing the proposal’s the easy part. These days, it’s all about ‘capture’. That’s the future for our profession. That’s what the clever people are all doing now.”

And, of course, ‘capture’ is indeed key to winning business. Working out the right overall plan for the end-to-end campaign. Determining how best to learn about, and influence, the client from the earliest days. Understanding the competitive landscape – and how to scare the competition!

Determining how to develop the best proposition. Identifying the right people internally to be on the team

– and, often, which external partners need to be part of the family. Coaching them to design a great solution and financial model that will appeal to the client and optimise the balance between quality and price. Making sure that senior executives internally are on board with, and can contribute appropriately to, the plan.

I know many top-notch salespeople who can do this superbly without needing an extra pair of hands to facilitate the process. And I also know many in our profession who are great at making this stuff happen smoothly and effectively. Indeed, I have colleagues in Strategic Proposals who are brilliant at it; who love doing it. And as APMP’s #1-ranked Approved Training Organisation worldwide, we’re looking forward to helping people pass APMP’s new capture “micro certification” after it recently launched at the association’s Capture Conference in Virginia.

But there’s a real danger here that, as our profession jumps on the capture bandwagon, we lose sight of the fundamental importance of great proposal management – and what that really entails. And I’m fundamentally a proposal guy.

It’s the age-old discussion, understood by too few and fudged by too many, that bid management and proposal management are different (albeit closely related) disciplines. Bid managers – shaping and co-ordinating the overall campaign – often make spectacularly poor proposal managers: the skill sets are so very different, and the competing demands for their time so overwhelming.

I say ‘danger’. Actually, there’s opportunity, for those who understand the real value-add of the high calibre proposal professional. Because great proposal management doesn’t start when an RFP lands: it’s not about opening the exam paper and starting to answer questions.

I want to be confident that we have more momentum behind our proposal effort than anyone else in the race by the time the RFP lands. I’ll have fired up my team, making sure they’re motivated, hungry, excited. I’ll want us to have determined who’ll be reading the document and approving the decision, and what makes them tick. I’ll want to be confident that my proposal (note the slightly inappropriate possessive) will be sown onto fertile ground.

We'll have worked out our likely story. We'll have predicted what we're going to need to write – and started developing that material, rather than waiting to craft content against the clock. Cats are easier to herd if you have a little time and they're not feeling hunted.

In short, I'll want us to have used structured, well-polished tools and techniques for pre-proposal planning. And I can't help but think that many of those in the proposal world could bring more benefit to their organisations by adopting a stronger approach to this core proposal discipline than by joining the rush to embrace 'capture', currently so in vogue.

So here's to those who are brilliant capture managers. I love working with them, and it makes my life so much easier if they've done their jobs well.

But here too is to those who are great at proposal management – and those too who are great at writing, editing, document management, design. Proposal disciplines, which risk being viewed as poor relations in the great new capture world. Give me the right team and the chance to develop a great proposal, without a capture plan, and I may very well help win the deal – much as I sometimes wish I had a business card that reads 'miracle worker', rather than 'proposal manager'!

HERE'S TO THOSE WHO ARE BRILLIANT CAPTURE MANAGERS



Pippa Birch

LET'S HAVE A CRACK AT THIS ONE...

CLIENT: "Hi Pippa, here are the documents to a really interesting opportunity we would like to have a go at."

PIPPA: "That does look like a good opportunity. What do you know about the client? Who else is going for it?"

CLIENT: "We haven't worked for them before*. Didn't realise the tender was coming out to be honest. Not sure who else is going for it."

PIPPA: "Um, OK. When is it due in?"

CLIENT: "Week Friday"

PIPPA "..."

True story.

**And happens more often than I would like.
(*rolls eyes*)**

Anyway, no point in getting annoyed. We need to assess the situation. If they really want it and think they can deliver it, what should we do to ensure a winning response to the submission requirements?

In an ideal scenario, I would be handed a customer-focussed Capture Plan including Competitor Analysis, Customer Hot Buttons, Win Strategy and so on. I would be engaged well before the tender documents were released, to prepare solutions and gather evidence. We would be ready to run with it when the opportunity landed.**

However, the most usual situation is that my clients (before I spend time working with them, obviously!) will not have done the capture planning they should have been doing, so I need to play catch up. PDQ.

Firstly, I take a deep breath, regroup and remind myself what it is I need to know. I then carry out retrospective activities, exert patience and ensure my clients learn lessons for next time.

Getting capture done quickly usually requires the right people to be in the room (or on the call). If you can get the MD in on those discussions, you get brownie points. The first question I ask them to think about is "Why do you want to win this?" I then walk them through an extremely shortened version of the capture process, resulting in a bid/no bid decision:

The Opportunity	Your Company	Your Competitors	The Win Strategy
What is the opportunity? What does the customer want? Do you have an existing relationship with the customer? If not, why not? What evidence do you have of delivering similar contracts? What does the bidding process entail?	Do you have the resource to bid for the opportunity? Do you have the resource to deliver the contract? Are there any other tenders due in that would be more important than this one? Is there anything in the contract pipeline that would take precedence?	Who are your competitors? What do you do that they don't? What do they do that is brilliant? What do they do that the customer probably hates?	How will you win this? Complete a simple strengths, weaknesses, opportunities and threats (SWOT) analysis. Bid/No Bid decision (although this is late, it is important for them to realise how important it is to make an informed decision).

I take notes manually with a pen. On paper. Madness in today's technological world you may say. But there is a reason. I don't use a laptop because I like to read through my notes later as I make sense of them and type them up – it embeds the knowledge in my head and focusses my mind on the task in hand.

(Incidentally, if you need a starting point; the APMP's Body of Knowledge has some great free templates for members, including a Competitor Comparison matrix, Capture (Opportunity) Plan template and a SWOT strategy sheet.***)

Ideally, at the end of this session, everyone should have a good idea of what the opportunity is, what the customer wants and who their competitors are. They will also understand whether they can deliver a winning submission, whether they can deliver the contract, and what the strategy going forward is.

At this point, I need to be cracking on with writing the submission for them, so everything else is done in tandem, e.g. evidence gathering, Executive Summary, etc.

Of course, it is part of my job as a consultant to train my clients in getting it right. I help them to develop appropriate processes to create a visible pipeline and a proper bid/no bid procedure. I help them to work out how to target customers and contracts easily, so they can get to know their customer and capitalise on relationships.

It is up to them to implement the right processes so that my job is made a little easier next time, resulting in their businesses being successful. Some of them are doing very well. Others? No comment!

The journey continues....

I TAKE NOTES MANUALLY, IT EMBEDS THEM IN MY HEAD

*I have some clients who want to go for opportunities in sectors they haven't even delivered before. Yep. No evidence whatsoever. Still, I like a challenge...

**Surprisingly, this did happen with a client once without my prompting – I actually staggered backwards a little bit.

***I'm sure there are some other good tools out there too.

Sarah Hinchliffe

CAPTURE THEIR HEARTS

In the early '80s, I was privileged to join what was then ICL – now owned by and known as Fujitsu. I was a rookie graduate, bag-carrying for a seasoned salesman in a team responsible for the Royal Air Force account. My first job was to analyse the competition for a major re-bid. Being well before the days of the internet, this involved hours combing data in Slough library. My work contributed to us winning, which triggered the sales bug in me. Within 18 months, I had completed the intensive 10-week New Salesmen's Programme – one of the most respected sales boot camps of its day.

Why is this important?

Because those early days and experiences taught me so much that has served me brilliantly ever since.

Back then, we didn't have bid managers. We were one joined-up team that found, developed and closed business – and that included bidding. I learnt how to plan out a territory, an account, an opportunity and a bid. I learnt how to identify prospects, engage clients, qualify opportunities, analyse competition, build and execute a win strategy and pull a proposal together. I carried on doing this for the next thirty years.

When I eventually decided to specialise in bidding – an aspect of sales I had always enjoyed – I was baffled. It was, indeed, a new profession that had emerged during my time as a salesperson, but why did anyone think bidding was separate to selling? Why write a document to win something not preceded by a period of nurture? Wasn't it obvious that you have to build a client relationship first? The idea of a "blind bid" was just plain weird.

Whether you apply neuroscience or just plain common sense, it is evident that emotion plays a huge part in decision-making. So, to convince a buyer to buy something, you need to do more than present a product with a logical purchase justification. You need to make an emotional connection – get them to fall in love with you, as I put it. This takes time – and it's best done face to face before you receive any formal request for a proposal document. You need a healthy dose of natural empathy and a sound capture strategy, with a plan and actions.

Despite being trained in every sales methodology under the sun, my favourite method for developing a capture plan is still based on the MEAN ACTS that I learnt at ICL. Now, don't get the wrong idea here. Yes, our training did take place at the decadent country pile known as Hedsor

House and we did get up to some youthful shenanigans, but MEAN ACTS wasn't a depraved initiation ceremony into the world of sales. It was a valuable qualification checklist. The idea being that you understand about your prospect's Money, their Emotions, who has the Authority to buy, what they Need, Areas where you are unique (a bit odd, that one), the Competition, the Timescales and, finally, your Solution.

Now, some of you might be saying that MEAN ACTS is just a re-hash of other well-known checklists, but the important thing for me is that MEAN ACTS contains that all important E. All those years ago, long before we got tuned into EQ and empathy, I was taught the importance of winning the emotional sale.

To turn your MEAN ACTS from a snapshot in time to a working plan (see diagram), build a series of questions for each buying cycle stage, test yourself against these regularly and create actions to fill in the knowledge gaps and change the customer's perceptions.



Customer buying stages

Money					
Emotion					
Authority					
Need					
Areas of Uniqueness					
Competition					
Time					
Solution					

- Develop questions per category and per buying stage
- Increase the depth and breadth of questions as the buying journey progresses
- Identify actions to improve your opinion

Figure 1: Making MEAN ACTS work for you
 Answer the questions honestly and task yourself to fill gaps and reinforce messages

The great thing about building on a single technique like this is that you can keep it simple (which is great for Small and Medium Enterprises) or you can get more sophisticated, adding complementary techniques such as a Bidder Comparison Matrix.

If you start early, iterate often and complete your actions, by the time an RFP is issued you should be in good shape. You will have a great set of information to pass to your bid team and a fighting chance of developing a win strategy and a proposal strategy instead of stabbing in the dark.

So come on salespeople everywhere, do the right thing by your bid colleagues – get disciplined and get joined up.

IT'S A TEAM GAME!



Tim Snell

GOOD CAPTURE = BETTER NO-BID DECISIONS

Capture is finally having its moment and it's very exciting!

Capture is still somewhat misunderstood and under-used. This is despite its growing popularity and the increasing recognition of the value of better capture and pre-proposal engagement. However, when used well, it can be a powerful, business-winning technique that delivers excellent results.

What capture is not

Capture is not solutioning when the ITT is released or something you start when a contract notice goes up on the internet. It is an ongoing series of activities that starts long before the concept of the ITT was conceived by the client.

Doesn't the salesperson do capture?

Not quite. Everyone involved with a client has an opportunity to participate in capture. Often there are key players such as salespeople, project delivery teams (on incumbent contracts), support functions and members of the leadership team who are most often involved in capture tasks.

Some larger organisations employ Capture Managers or Capture Coaches as discrete positions; otherwise these may be roles that individuals take for the duration of an opportunity.

Why does capture go wrong?

In my experience, issues mainly arise in three key areas:

1. Competitor intelligence – this is often addressed once (big mistake!). Like client engagement below, competitor intelligence gathering is an ongoing process and not a one-time event.
2. Client engagement – if I had £1 for every time someone said to me, “My clients won't allow us to speak to them”, I'd be very, very rich. It may be true that you don't have a strong enough relationship with a client and they don't want to have that conversation with you right now – but client engagement is a process of consistently showing up, adding value, building trust and looking for ways to serve that client.
3. Timing – too many companies start capture too late, and this applies to re-competes as much as it does to new business. The companies that do capture better than others see it as a continual process and not something they just decided to do to win 'this time'.

With these three issues in mind, better capture can be framed as a consistent approach to building relationships, gathering data and building solutions for clients in a harmonious way.

TOO MANY START CAPTURE TOO LATE



How can you get better client engagement and competitor intelligence?

There are many ways companies can create opportunities to meet clients, engage with them and learn more about their interests. The prevalence of social media makes a lot of data readily accessible and, like many things in capture, it requires consistent effort and creativity. Trust isn't built overnight and neither are relationships. Winning companies take a long-term view and start their capture efforts early.

In re-compete, I'm often surprised that incumbents aren't consistently talking to clients at multiple levels and instead rely on a single point of contact. Winning companies engage all levels of the company in capture efforts and make it a priority to build relationships at peer-level within the client organisation.

It also surprises me (read: beating my head against a wall) when I learn that companies don't conduct informal or formal customer satisfaction reviews on long-term contracts. They don't ask why they were selected on a contract as a way of understanding what the client's buying drivers really were. It may be that after the win, business development is onto the next opportunity and the delivery side of the business doesn't see the value in these conversations when revenue can be generated. These are all lost opportunities for better capture.

I still encounter too many examples where the competitor analysis is an exercise in guesswork. AI-driven tools can go some way to helping map the market, but these tools can't go to events or meetings and talk to the decision makers.

Where I have seen capture executed well, it has involved the entire organisation engaging with a client to develop deep relationships or where trade-offs in solutioning have delivered irresistible value that incumbents were too entrenched to see.

An added benefit

One overlooked benefit of good capture is better and stronger no-bid decisions. People mistakenly believe that engaging in capture means they'll always win.

I'm looking forward to the new APMP Capture Certification and I'm curious to see how it will shape our industry into the future.



Jeremy Brim

CAPTURE, CREATING GREAT OPPORTUNITIES

2020 has to be the year of Capture Management and it's about time. You'll hear a lot of noise about Capture this year, but what is all the fuss about?

What it isn't

It isn't a new tactic; it's been about for decades. But it is still immature - nobody good at it wants to share their best practice. Most consultancies play at it and large companies treat it as IP.

It's not solely American, though it's often seen to be an American invention and best practice. In reality there is a difference in how deals are secured, culturally and practically, between the States and almost the entire rest of the world (who, if anything, are more aligned to UK-led thinking).

I founded my business to help organisations join the dots between brand awareness through business development and into proposals. Capture is a missing link. It's more than just the glue that binds the hard work of marketing and sales efforts with the proposal phase. It empowers the client-facing effort with insight, arms it with bespoke valuable solutions and delivers unbeatable propositions.



CAPTURE IS THE MISSING LINK



Why is it important?

There is nothing worse than a cold bidders' conference. There are exceptions, but largely you sit there wishing they had asked you what the solution should be, because you could have done it better, faster, and cheaper – delivering greater value – if you had just got in front of them a year ago.

Worse still, if you haven't influenced the client, someone else has. It's a well-known stat that more than 60% of procurement decisions are made before the RFP is released. Someone in that room has influenced the procurement to suit them (and not you).

But now it's too late. The firing pistol has gone off and you're in a competitive race, behind the curve, and trying to polish their turd as best you can.

Successful organisations with high win rates avoid cold competitive scenarios at all costs. APMP defines how high performers develop long range, realistic, detailed plans and focus teams on driving action to move them to a favored position. I go a little further. I coach people of all seniority levels to leverage account planning and capture to land proactive propositions with clients, collaboratively engineered to solve their problems and deliver unquestionable value. The goal is to negotiate a deal, with a fallback plan of winning a tender with ease.

The ability of proposals teams to win opportunities only once they are released is limited. We safeguard our organisations from losing all the time and we may steal the odd mark with thoughtful storyboarding and writing – but there is so much out of our control. The great multiplier effect on ability to win happened weeks, months and years before the RFP. Capture eats good bids for breakfast.

THINGS TO FOCUS ON

Sponsorship

The biggest determining factor in win rate and growth trajectory is leadership enabling the business to differentiate, proactively position well and pursue only opportunities that it should win. They sponsor a measured approach to targeting the right business, growing accounts and securing deals far before RFP.

Value

Your proposal is a love letter to the greater differentiated value you will create. Capture is about finding ways to figure out what value means to the client with more insight than others, and ideally figuring out the winning solution alongside them. It should be a no-brainer.

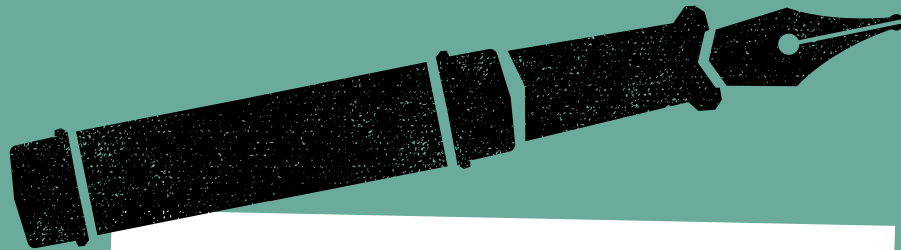
Trust

People buy people and what they can do for them. Their personal performance and bonuses depend on the performance of the people they are buying. Trust in your people is paramount in the client's emotional and calculated decision. They need to believe your people are not just the best for the job with the right commitment and competence, but that they are people they can work with.

Grab it with both hands

Capture presents a fantastic avenue for career development and recognition for proposals professionals. Client facing staff aren't equipped for methodically running capture initiatives. You are. It's an open door to improving the quality of opportunities we face in the war room while growing our sphere of influence, generating greater value and being recognised and rewarded for it.

INVESTIGATING OUR EXPERTS



Graham Ablett
Proposal Management 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.



Pippa Birch
Highways & Civil Engineering Expert

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).





Tony Birch
Capture and Process Expert

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.



Jeremy Brim
Business Development Expert

Jeremy works with leadership teams and business owners as a consultant & 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.



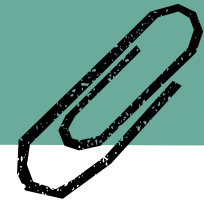
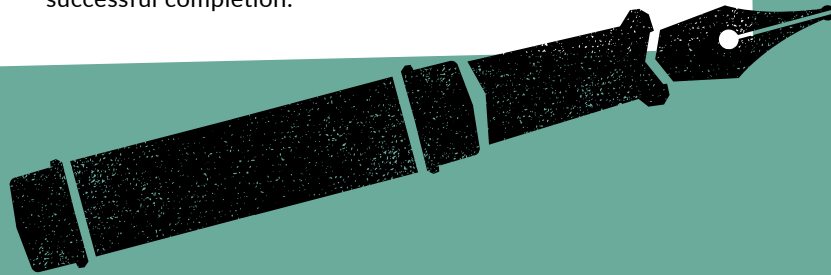
Holger Garden
Construction Expert
& Professional Coach

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.



Andy Haigh
Public Sector Bidding Expert

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.



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.



Sarah Hinchcliffe
Sales & Bid Expert

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.



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 provides market leading people, tools, training and solutions to help you win more.



Tim Snell
Executive Coach & Capture Expert

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 U.K., 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.



Steve Webster
Pursuit Specialist

Steve is a Pursuit and Capture Practitioner working in the technology and services sector. He is passionate about helping individuals unlock their inner potential and is currently a student at the Henley Business School undertaking a post-graduate certificate in Coaching.



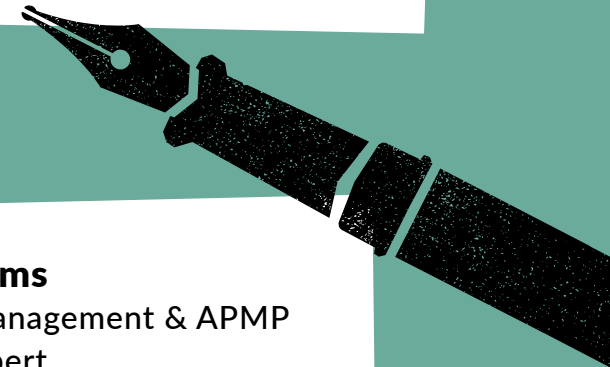
Simon Wellstead
Advertising & Marketing Expert

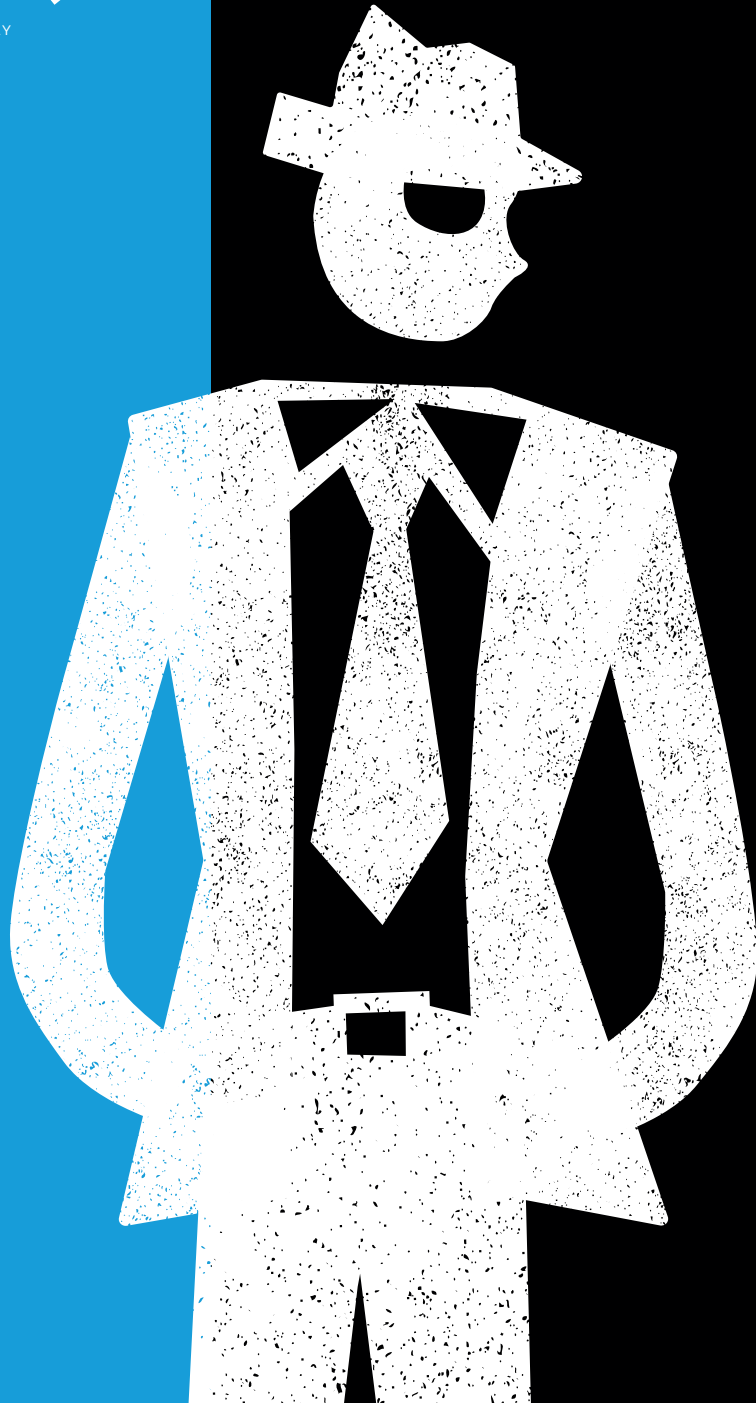
SMSW Media is a creative & marketing agency with one focus – maximising revenue for its clients. Simon's early years working in blue-chip sales means he understands what it takes to grow. His dogged determination to challenge at all levels means that he can cut through the crap and unearth true value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



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.





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