10 STEPS TO BID READINESS

bidwrite

PRIOR PLANNING MAXIMISES BID OPEN PERIOD

If you're waiting for a request for tender (RFT) to be released before working on your submission, you're already putting yourself in a difficult position.

BidWrite has a standard preparation approach when assisting clients with large tenders. This ensures that your whole bid response team and relevant industry partners (if any) are aligned and ready to respond to the RFT as soon as it is released.

CRITICALLY, THIS MAXIMISES THE PRECIOUS BID OPEN PERIOD

Our approach comprises 10 steps – all of which are tailored to the opportunity in question, existing client capability and response timeframes.

THE 10 STEPS

1. ASSESS BID READINESS
2. DEVELOP WIN STRATEGY
3. IDENTIFY AND CONFIRM BID TEAM STRUCTURE
4. ESTABLISH BID MANAGEMENT TOOLS, SYSTEMS AND PROCESSES
5. TRAIN AND COACH INTERNAL EXPERTS
6. REVIEW AND TAILOR EXISTING RE-USE MATERIAL
7. IDENTIFY AND DEVELOP RESPONSE TEMPLATES
8. IDENTIFY AND PROGRESS LONG LEAD ITEMS
9. COMMENCE EXECUTIVE SUMMARY DRAFTING
10. DEVELOP INITIAL RESPONSE SCHEDULE AND PROPOSAL MANAGEMENT PLAN

STEP 1 – ASSESS BID READINESS

BidWrite has an established model for assessing the maturity of an organisation's tendering function. The full process investigates 40 different areas across the five categories of:

Processes, People, Resources, Proposal Organisation and Output.

We use selected elements of this model to assess your overall readiness, highlighting any risk areas that need to be addressed. Areas of interest usually include:

» content development process

» approval process

» document management process

» graphics development process

» previous tenders and re-use content.

This assessment informs planning for the scale and range of future step activities, in particular *Step 5 - Training and Coaching*

STEP 2 – DEVELOP WIN STRATEGY

The objective of this task is to clearly identify why you will win the opportunity. This needs to be documented in order to ensure a compelling and consistent story throughout the submission.

An effective bid strategy:

» is structured around the key customer issues associated with the project

» presents a compelling and differentiated approach to addressing these issues

» accurately reflects your competitive position, as perceived by the client

» identifies supporting evidence needed for the response (both existing collateral and items that need to be developed)

» develops key messages and content strategies which are then mapped onto specific tender deliverables.

Developing a structured bid strategy document typically involves a facilitated workshop, or series of workshops.

The resulting bid strategy document provides the additional benefit of helping define the initial structure and high-level content for your Executive Summary.

STEP 3 – IDENTIFY AND CONFIRM BID TEAM STRUCTURE

Early confirmation of the size, shape, roles and responsibilities of your tender response team will deliver a more effective team and ensure no valuable time is lost. This process will also help identify any resource gaps prior to the RFT being released.

Three-tiered proposal team structure for major tenders

» **An Executive Steering Committee** providing senior management oversight and sponsorship. In addition to providing an important governance function, this group's responsibilities can also include support for:

- any ongoing client influencing plans during the tender period
- the identification and, if necessary, recruitment of key personnel
- the resolution of key issues identified by the Bid Manager.

» **The Core Bid Team** – this team consists of the senior people within the proposal team (e.g. Bid Manager and their 2IC, plus Solution, Pricing, Commercial and Volume Leads). This team regularly reviews, monitors and manages overall progress and typically meets as a core team to discuss key issues that the wider team do not need to be involved in.

» **The Wider Bid Team** – this team comprises other individuals with specific bid responsibilities. This group will also participate in the regular progress reviews and stand-up meetings established by the Bid Manager. The actual composition and size of the wider bid team will be strongly influenced by the structure and content requirements of the RFT.

TWO THINGS WORTH REMEMBERING

Deadlines are not an aspiration

All people assigned with responsibilities for the bid should have their availability confirmed directly with their line manager. This will help ensure that individuals are given the capacity to apply the necessary priority and effort to their proposal deliverables.

Availability is not a skill

It is vital that people are assigned because they have the required skills, experience and knowledge, not because they are available or have capacity. When availability is the key driver of assignment, this it is often detrimental to the bid.

STEP 4 – ESTABLISH BID MANAGEMENT TOOLS, SYSTEMS AND PROCESSES

Many bid-mature organisations use SharePoint (or similar collaboration tools) for bid document management and control. Your collaboration system should be reviewed to ensure it can be configured to effectively monitor proposal development progress, as well as providing overall documentation control.

Depending upon the output from *Step 1 (Bid Maturity Review)*, other standard bid management tools and processes that may need to be established include:

» progress tracking and reporting

» issue and action logs

» clarification question tracking

» graphic development process

» compliance tracking

» initial bid dictionary of common terms

» drafting style guide and writing guidance for authors.

Prior to the RFT being released, this step should also focus on other resources that will support your bid team. For example:

» IT, including access and authorisations required for all contributors

» bid rooms and separate breakout areas

» hard copy documentation filing and storage

» whiteboard access.

STEP 5 – TRAIN AND COACH INTERNAL EXPERTS

A common challenge with large tenders is ensuring that internal experts are aware of tendering best-practice and how they can best support the production of a compelling submission.

It is recommended that the SMEs who will have substantial involvement in producing content receive early training in:

- **the overall content development process**, from initial outlining/storyboarding through to final production.
- **using document templates** and editing/drafting techniques to ensure that their contributions do not lead to unnecessary document corruption and the costly process of downstream rectification and reformatting.
- **how to achieve client focus** within their areas of responsibility. This involves communicating the issues important to the client, the benefits of your solution and providing the proof that makes your claims credible. Many internal experts focus solely on the solution or simply answering the question. This results in a compliant, but not compelling response.
- **basic persuasive writing techniques** so they can effectively support specialist bid writers, particularly in the development of informative graphics.

Training is usually provided in the form of a half-day workshop. To improve the learning outcomes, our preference is that this training is highly interactive with exercises and content developed, in part, from previous proposals. In our experience these workshops also provide the additional benefit of aligning and motivating people for the forthcoming RFT.

STEP 6 – REVIEW AND TAILOR EXISTING RE-USE MATERIAL

Reviewing existing material and previous tender responses allows us to benchmark them against best-practice to identify specific areas for improvement. It also reduces costs by identifying collateral that can be tailored and reused for the current opportunity.

While related to *Step 1 (Bid Maturity Review)*, this is a more detailed review that benchmarks the quality of material from previous responses against ten criteria across the following two categories:

» Information

What the bid says, including key messaging and evidence of client and competitive focus. Criteria include:

- strategy and messages
- client focus
- competitive focus
- bid compliance (completeness/accuracy)
- bid content (relevance/weighting).

» Presentation

How the bid is presented, including layout and structure. Criteria include:

- document structure
- page design
- graphics
- writing style
- packaging.

STEP 7 – IDENTIFY AND DEVELOP RESPONSE TEMPLATES

There are usually several standard templates that can be developed prior to release of a tender. These typically include templates for:

» the main submission/response

» supporting plans

» resumés

» position descriptions

» project case studies.

Consideration also needs to be given as to what tender deliverables, other than the Executive Summary, will be developed using specialised publishing and/or design software. Ideally this decision needs to be made, at least provisionally, prior to the issue of the RFT. This is due to implications on cost, expertise and the schedule established for proposal development.

MS Word templates should be constructed using the styles functionality in order to:

» maintain a consistent and professional appearance

» support best-practice page layout

» reduce the risk of template corruption.

STEP 8 – IDENTIFY AND DEVELOP LONG-LEAD ITEMS

This activity identifies long-lead solution development tasks that can be commenced early in order to reduce risk during the open period.

Common tasks include:

» **Identification of high-level organisation chart(s) and key people** – the identification of suitable candidates for key personnel referenced in a bid typically demands a substantial amount of time from senior people, especially if this requires external recruitment.

» **Selection and approval of partners and subcontractors** – any decisions made prior to the RFT release, even if they remain provisional until its issue, will make it easier to integrate partners and subcontractors within the proposal development process.

» **Confirmation of delivery methodology** – the majority of major tenders require you to describe and document how you will plan and execute the work to be delivered throughout the contract lifetime. Because this will have been considered as part of your bid/no-bid decision, make a start on documenting this early.

STEP 9 – COMMENCE EXECUTIVE SUMMARY DRAFTING

After your win strategy has been developed *(Step 2)*, you'll be ready to start the first draft of the Executive Summary which will accompany your bid.

Early drafting of the Executive Summary is recommended because it:

- » validates the effectiveness of your win strategy
- » invites and facilitates early executive engagement
- » reinforces the overall win strategy and key supporting win themes for the bid team.

Providing an early version of the Executive Summary at the RFT kick-off meeting not only helps ensure the whole bid team is on the same page from a strategy perspective, it also provides a great example of proactive leadership and the standard of professionalism expected of the bid team.

STEP 10 – DEVELOP INITIAL RESPONSE SCHEDULE AND PROPOSAL MANAGEMENT PLAN

This final preparatory step involves developing the:

» initial response schedule for the expected open period

» proposal management plan.

Response schedule

The response schedule should include a detailed plan for the first two weeks (or so) leading up to the RFT kick-off meeting with the entire bid team. Global industry body APMP (the Association of Proposal Management Professionals) recommends that the kick-off meeting is held approximately 10% into the bid open period.

Your response schedule should also reflect the '20-60-20 rule' as recommended by the APMP. This rule suggests that approximately:

» the first 20% of the open period is spent planning the response

» the middle 60% of the open period is spent writing

» the final 20% of the open period is spent reviewing and improving bid persuasion elements.

Proposal Management Plan

For major tenders, early drafting of a Proposal Management Plan is good practice. This plan integrates many of the outputs from the preceding preparatory tasks.

Typical contents for this plan include:

- proposal project summary
- customer profile
- competitive analysis
- win strategy
- proposal organisation and roles, including writing assignments
- proposal schedule
- proposal dictionary
- proposal operations, including facilities, support, relevant procedures (e.g. clarification questions and graphics requests), and progress/stand-up meeting frequency.

IT'S NEVER TOO EARLY TO START

With more than a decade of experience working across multiple industries, we've helped clients submit over 1500 bids, most of them large. We know what the level of competition can be like and we understand that preparing a response for major tenders can be a daunting prospect.

We also know that starting early is a key enabler for success. Tendering is a very deadline-driven activity, so anything you can achieve prior to the release of an RFT is 'time in the bank' for when the clock truly starts ticking.

Hopefully this guide has provided you with some practical advice about how you can maximise your bid open period, by focussing your attention on a number of constructive activities that can be completed prior to the RFT release.

However, if you have a must-win major tender and you'd prefer to engage specialist expertise, we'd be happy to talk, preferably sooner rather than later.

The more time we have, the more we can improve your chance of success.

Contact BidWrite for more information:

1800 BIDWRITE (1800 243 974)

linkedin.com/company/bid-write/

bidwrite@bidwrite.com.au

bidwrite.com.au

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