The winning approach to managing proposals

Proposal support services from Strategic Proposals
WITH 14 YEARS’ EXPERIENCE OF HELPING CLIENTS TO WIN MAJOR BIDS, STRATEGIC PROPOSALS IS RECOGNISED FOR LEADERSHIP IN THE PROPOSAL PROFESSION. IF ANY OF THE FOLLOWING ARE IMPORTANT TO YOU, READ ON!

I WANT TO...

- Improve our win rates
- Win our next major bid
- Bring in expert skills to help our in-house bid team
- Adopt a less reactive approach to our proposals
- Make our proposals a source of competitive differentiation
- Be more innovative with our proposals

THE STRATEGIC PROPOSALS TEAM SUPPORTED TWO BUSINESS-CRITICAL FRAMEWORK BIDS FOR US IN SUMMER 2014, HELPING ELEVATE GOOD RESPONSES TO NIGH ON PERFECT QUALITY SCORES. THE PEER REVIEW PROVIDED INVALUABLE INSIGHTS AND PERSPECTIVE. RETURN ON INVESTMENT WAS DRAMATIC AND PROBABLY THE BEST MONEY WE’VE EVER SPENT.

Commercial Manager, IT
Winning your next bid

Your written proposal should be a source of competitive advantage in any bid. Done right, it will propel you significantly ahead of the competition. Done wrong, it can lose you the opportunity. So it’s critical that you have the right support at the right time to help you capture the most important deals on your pipeline.

We can work with your team on key deals to provide expert proposal management – ensuring that you develop the best possible submission even within the shortest of timeframes. Whether you are responding to a commercial RFP or government tender, or submitting a proactive proposal, we’ll help you by:

1. Helping you to take a robust qualification decision, early in the bid, to ensure you invest scarce resource on the right opportunities

2. Building the proposal project plan – ensuring roles and responsibilities are clear and managing as the rest of not only developing the plan, but delivering up on it

3. Storyboarding - helping subject matter experts to design answers that will maximise your evaluation scores, and to develop content quickly and confidently

4. Leading proposal reviews – to identify prioritised recommendations to improve your evaluation scores

5. Developing a compelling proposal strategy and the win themes – to persuade the evaluators to choose you, not the competition

6. Working with contributors as they draft their area of the proposal writing it with them and/or editing and polishing their content

7. A pre-proposal planning workshop – Starting earlier in the process to help plan for a future response and potentially influence your client before they go to market

8. Developing templates and graphics, version controlling and managing the formatting and production of your submission across any and every available media
A high-impact proposal review

You’ve developed your proposal – on your own, or with our support. It contains lots of good content – but are you truly confident that it will hit the mark for the evaluators? Our panel of expert reviewers have a background in winning major bids, as well as in procurement. We’ll take the near-final version of the document you’ve developed and carry out a peer review – sometimes known as a ‘red team’. With independent and fresh eyes, we’ll review it top-down:

• Do you create empathy with the client?
• Does it tell a persuasive story?
• Is your offer easy to understand?

We’ll review it in detail, too, suggesting how each and every answer can be sharpened. (We’re experienced in offering feedback constructively, too, so that authors embrace suggestions positively and can act on them quickly and effectively.) Experience shows that a good peer review – improving the content to be as good as it can possibly be – can improve your score in the customer’s evaluation by up to twenty per cent. And, for the sake of a small amount of time at the end, it’s surely an essential part of any serious proposal effort.

Professional pitches

You’ve submitted your proposal. The client’s asked you to come in to present. We’ll help you to prepare the best presentation possible, using a proven, structured process. We’ll ensure that you assess the objectives for the session, understanding the client’s expectations and the messages that the team needs to put across. We’ll explore creative techniques for structuring and presenting your story. We’ll also help to design high-quality, high-impact presentation materials – using PowerPoint, handouts, posters, boards or other media – and supporting collateral. We’ll help the team to rehearse, in front of experienced buyers where appropriate, to build their confidence and polish their approach. We’ll leave it to you to deliver the presentation. But we’ll then quickly ensure that the team reviews how it went, acting swiftly to follow up and position you well for future negotiations.
Was your last proposal a joy to read? Your sales staff and technical experts bring undoubted subject matter expertise, but are any of them truly able to write fluent, compelling text? Even most in-house bid managers confess that writing isn’t their core competence. As a result, proposal writing tends to be merely mediocre; documents lose impact and fail to create the necessary empathy with their readers.

Our team includes the very best proposal writers who will use a range of interviewing and editing techniques, we’ll help your time-pressured subject matter experts to articulate their story as efficiently and persuasively as possible – saving cost and increasing quality. We don’t seek to second-guess your solution; rather, our specialist editors turn your content contributors’ draft ideas and words into the most fluent, compelling final story.

Buyers see what your proposal looks like before they read what it says – and so the look and feel of your document has a huge impact on their perceptions of your story.

Professional, tailored design helps your document to capture the buyer’s imagination – and research shows that it can improve your evaluation scores substantially, too.

Our design and document management specialists – in collaboration with industry-leading proposal print providers – produce truly high-impact proposals. Bespoke packaging, covers, section dividers, page layout, photography, tailored graphics and skilled formatting make your proposal look hugely customer-centric and ensure that it stands out from the crowd.

We’ll engage creatively with you to understand the impact you want to make, and the options for doing so, and develop an affordable approach for each deal.

Multimedia has long played a part in proposal submissions: for example, the occasional embedded video – the message from our Chief Executive – or a client case study.

We’re expert at developing high-quality video content. But we can also help you to embrace more innovative techniques – the “video proposal”, for example, where key stakeholders (and reference customers) bring your proposition to life in a coherent, packaged format. High quality. High impact. And a source of differentiation as you seek to spark the imagination of the client’s evaluators and senior executives.
Many companies have in-house staff who are adept at writing content and collating the necessary documentation. But for some deals you want that extra magic, to ensure that your team develops a truly first-class proposal. Our Will-Win Proposal Package provides effective interventions at three key stages of the project:

- **Proposal strategy:** a workshop to ensure that the team is clear up front on your story and win themes
- **Storyboarding workshop:** helping subject matter experts to work out what needs to be said, section by section, question by question, to maximise your scores in the evaluation
- **Peer review:** setting aside a defined amount of time to review your draft proposal, once it’s approaching completion, to highlight opportunities to sharpen your content.

Many clients depend on this package for all of their major bids, embedding best practice and optimising their win rates.

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**Game-changing proposal tactics**

**Influencing the client’s RFP**

Most sports teams win more matches at home than they do playing on their opponents’ turf. So too with proposals: if you’ve shaped the client’s specification and criteria in your favour, your chances of winning increase exponentially. (And if you’ve ever read a Request for Proposal and thought: “Someone’s been in there influencing their requirements, criteria and process… and it wasn’t us!”, then you’ll understand just how important this is).

With our deep legacy in procurement as well as proposal management, we can help you to develop best practice RFP documentation for you to share with your clients, shaped to your competitive advantages and setting traps for the competition. As a result, you’ll wire the whole process in your favour from the start.

**Proposal star chamber**

Are you confident of success on all of the must-win deals on your pipeline?

Our “Star Chamber” process, operating fortnightly, monthly or quarterly, invites in the staff leading your most important current and prospective deals. Against a clear agenda, we’ll lead a walkthrough of the current status of each proposal.

For senior management, this offers greater visibility and a chance to contribute wise counsel and great ideas. For the team working on the proposal, it’s a source of constructive challenge and support – helping them to develop their ideas still further. It also ensures buy-in and resource for their plans, and increases their confidence and win probability.

**Renewal proposals**

When you’re the incumbent supplier, why get on to the slippery slope of a competitive RFP process in the first place? Why not proactively send your client the perfect proposal to meet their future requirements – well before they start to plan the renewal process?

Too many sales teams sit back and wait. If that characterises your approach with your existing clients, it’s time to break the reactive cycle. Our well-tuned approach to renewal proposal development is proven to help incumbents to retain contracts - playing on their terms, not their rivals’ - and to reduce their cost of sale.

Of course, in some scenarios a current client has to go out to tender at regular intervals. In such a scenario, we can help you produce more proactive documents (reflecting on successes and learning from your work with them to date, and looking at future delivery scenarios). This will help you to shape the client’s views, expectations and order winning criteria in your favour.

**In-deal training**

Everyone involved in your proposal should have the necessary skills. While we recommend training staff away from the heat of the battle – and offer a range of courses to help – there are times when you want to bring the team working on a specific deal together to ensure they understand best practice and the approach that needs to be followed. It’s also a chance to teach them new tricks and refresh existing skills, and to ensure consistency of approach.

Our intensive half-day In-Deal Training course – delivered early in the project, face to face or (for virtual teams) online – will bring the group up to speed with the essential elements of developing a great proposal.
Winning in the future

Learning review service
How do you repeat your successes, learn from things that went wrong, and continually improve?

Too often, companies only run reviews when they lose: they might as well label the meeting request with “Inquest” or “Post-Mortem”. Staff involved get defensive – while client debriefs often fail to unlock the true story. Learning from (hopefully rare) defeats is important, but we’re as interested in the deals that you won.

We can bring objectivity, credibility and a proven process to identifying lessons that can be learnt from each proposal. Drawing on our purchasing backgrounds, we can lead or contribute to client debriefs, creating empathy to ensure that you really do hear honest and open feedback about your proposal and how it compared to those from the competition.

Internally, we’ll bring those directly involved in the bid together for constructive, positively focused discussions about what went well (win or lose) and what could be done better on future deals. And any review is largely worthless if no positive actions result. We’ll help to present findings and recommendations to senior sponsors – ensuring that they buy into and champion any necessary improvements.

And how was it for you, when you came to actually deliver the project that you’d won? Did you delight the client from day one? Did the solution roll out exactly as expected? To ensure a close connection and joined-up thinking between those working on bids and those involved in implementation, we’ll run an end of project Bid/Delivery Review (or, for longer, ongoing contracts, a Birthday Review one year from contract signature).

More broadly, we can help you to benchmark your proposal capabilities and output, and build and deliver improvement plans. We’d love to chat further about that, too!

The right capacity to win

Interim support & retainer services
You may need our help on a deal-by-deal basis – or you may instead want the confidence that you can rely on us to help you to win a succession of deals over a period of some months, full- or part-time.

Do you need cover for a senior individual in your team, for a period of time? We can slot in quickly and seamlessly: a trusted pair of hands to take on their responsibilities.

Do you need a new head of bid / proposal management, to help you to win important deals, improve your proposal capabilities, coach and transfer skills to existing staff, and create a sense of buzz around your proposal process? All of our senior consultants have line management experience successfully heading bid and proposal centres, small and large.

Or do you want our support on tap for a series of major deals in the months ahead? You define the number of opportunities and the types of help that you’d like; we guarantee to deploy the right resource given an agreed amount of notice. You might want to secure our expertise to manage or provide our Will-Win Proposal support for (say) ten key proposals in the year ahead; you might want us to peer review each of your top two proposals every month; you might want a series of learning reviews. You might want us to become part of your proposal DNA. We’ll work with you to define the right bundle of services, at our most competitive rates.

Some organisations even outsource proposal management to us in its entirety. That takes careful planning from both sides, but we’d be very interested in exploring this type of arrangement with you.

“YOUR EXPERTISE AND GUIDANCE PROVED INVALUABLE IN OUR GETTING A LARGE EFFORT THAT WAS NOT GOING WELL BACK ON TRACK AND ULTIMATELY HELPING US TO WIN THE DEAL.”

VP of Marketing & Sales, Commercial Bank
**Flavours of success**

- **Fiercely competitive**
  - Capture rate of **89%** in 2015
  - Proven processes and tools
  - In-depth understanding of buyers

- **Passionate about winning**
  - **£2.1bn** revenue secured for UK clients in 2014
  - 100% scores for quality in many evaluation processes

- **Seasoned professionals**
  - APMP’s professional certification
  - Numerous industry awards

- **14 YEARS** supporting clients in the UK

- **A delivery team** who have all held senior proposal management roles
  - SOPHISTICATED tools to help develop and test resource requirements
  - Database of metrics and learnings from hundreds of improvement projects
  - A deep partner network for specialist proposal needs

**YOU MADE A HUGE IMPACT IN A VERY, VERY SHORT SPACE OF TIME. WHAT YOU DID WAS EXCEPTIONAL.**

Director of Relationship Management, Energy

**NO WIN, NO FEE**

Facing a hugely important bid, but no budget to fund much-needed external support? We may still be able to help – by charging no up-front fee for our time, in return for an agreed percentage of the contract value should you win.

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