Florence. Italy. 1512. The city is at war.

The young Florentine Republic, backed by the French, is crushed by Medici family, supported by the forces of King Ferdinand of Spain. Regime change leads to the arrest of the most loyal servants of the old order – amongst them, one Niccolò di Bernardo dei Machiavelli, who had served as a diplomat and as Secretary to the Chancery of the Republic (the John Kerry equivalent, if you like). He's imprisoned; tortured on the strappado, his arms tied behind his back as he's hoisted high and then dropped - in the hope he'll incriminate himself, and his erstwhile colleagues.

He withstands the torment; is despatched into exile; moves at the age of 44 with his wife Marietta and young family to the family home at Saint' Andrea in the Tuscan countryside – the sort of place today that would be renowned for its fine olive oil, its deep red wine, its holiday villas.

And there, the hero of this presentation – for a hero is what I will endeavour to make of him today – takes quill and paper, and starts to write...

Ladies and gentlemen, I’ve been fascinated by Machiavelli for many years – ever since he was referenced by an opponent in a debating competition at school. His name has, perhaps, become synonymous with evil – his work consulted, referenced, becoming an operating manual for some of the worst villains in history. Napoleon. Mussolini. Frank Underwood. Even the Devil’s nickname, “Old Nick”, is most likely a twisted tribute to Niccolò Machiavelli.

I took to handing out copies of “The Prince”, perhaps his most famous work, to the staff working for me in the bid centres that I managed, and then as a set text on the courses that I ran for proposal folks around the world. There were two reasons for this: first, the preface to the book, his letter commending it to His Highness Lorenzo di Piero de’ Medici (whose favour he hoped to regain by virtue of his writing). It is, perhaps, the greatest covering letter in history.

But second, and more importantly, there was a message I wanted to get across. It’s too easy for proposal people to be seen – and to see ourselves – as somehow inferior to the salespeople and senior managers with whom we work on a daily basis. I wanted to make the recipients pause and consider their roles: less subservient, more respected equals – the shock
factor of being handed such a notorious volume perhaps in itself injecting a little of that steel that might needed in the battles ahead.

My fascination continued to grow – as did my collection of books on the great (or notorious!) gentleman. I visited his tomb in Florence in August 2010 with my son, Benedict. And when I bought my sixteenth book about the author last year, my wife – perhaps showing a Machiavellian streak of her own – suggested that it was perhaps time for me to do something with them “before I drop them all off at the charity store in town”.

And so here’s the thing: I’m going to argue today that – whilst not offering a precise blueprint for life in proposals (“It’s better to be feared than loved”, for example, not always applying), many of his messages should resonate with us if we want to be seen in our organisations as leaders - and not as some sort of overwhelmed back-office admin factory.

I’m going to outline a ten-step approach to championing and implementing best practice – based on my team’s experience of building more than twenty proposal centres in recent years – to help to ensure that your companies have the right proposal capabilities in place to help win more business, with Machiavelli’s help and guidance at every turn.

Before I go on, let’s just get a quick view of who’s in the room with a very quick “Stand up” exercise:
- Head of bids or proposals in their organisation
- Thinks your company is brilliant at doing proposals?
- Thinks your company has the opportunity to improve its approach to proposals?
- Has the chance to change stuff – has influence over the way your organisation approaches bidding?
- Read “The Prince”?

OK, let’s dive in. I’m going to quote as I go from several of the author’s works – not only The Prince, but The Discourses, The Art of War and others – and weave a story if I may of how we might apply some of his ideas.

Step one – Recognise the need for improvement

The starting point – step one on our journey to embracing or enhancing proposal excellence in our companies – is, quite simply, to recognise the need to continually improve what we do.

For some, who are already doing great things, it’s a matter of recognising that what’s ‘great’ today probably won’t be tomorrow. Ours is a rapidly-evolving profession – as was illustrated to me when I scribbled on a document I was critiquing the other day for a client: “How very 2011.”
Stand up for a moment. Introduce yourself to two people you’ve not met before: your name, title, company. Then sit down.

Did any of you meet a competitor? I guarantee that if I’d let you keep doing that for another ten minutes, or urged you to do so throughout this conference, you would indeed meet the enemy: that proposal person from another organisation who’s just as determined to beat you on the next bid as you are to beat them. That fear factor – of falling behind the competition – is the first driver for change in many companies.

As Machiavelli wrote:

“To enjoy constant good fortune we must change with the times.”

*The Discourses*

And if you’re not: they probably are.

In other companies, it’s failure that drives change. In Machiavelli’s terms:

“When great calamities are about to befall, seers arise who foretell them.... Certain wise men say that the air is filled with intelligent beings who warn them beforehand by these signs to prepare for what awaits them.”

*The Discourses*

A client in the banking sector used a great phrase to me earlier in the year: “a floodlight bid” – those deals that are so important that everyone focuses on them. Losing a floodlight bid – or too many of them in quick succession – or your senior management receiving negative feedback from their peers in your prospects - drives change.

Put another way, from Machiavelli’s biography of Castruccio Castracani, Duke of Lucca – a state near to Florence:

“Castracani was wont to say that the road to hell was easy because one always goes downward with one’s eyes tight shut.”

*Life of Castruccio Castracani*
Or third: perhaps you need that eye-opening experience of a structured, independent external audit that might help – surveying your clients’ views of your recent proposals, and benchmarking what you do against best practice. If you are doing proposals the same way three years from now as you are today, your win rates will inevitably fall.

Step two – Take accountability

The second step on our journey is to recognise that, given the undoubted need to drive change, if we don’t do it, nobody else will. If we want to either make good things better, or drive away some of the demons that make proposal development unnecessarily hard going in too many companies, there’s no-one else out there in our organisations who’s going to do it for us.

There’s no knight in shining armour about to gallop through our office door; no fairies coming to sprinkle their magic dust over the “late nights and cold pizza”, to quote a phrase that my colleague BJ Lownie and I coined in our 2004 presentation to APMP’s conference.

We have to take control of our own destiny – or others will control it for us, or (perhaps worse still in some organisations) things will simply stay the same.

And that takes courage, as Machiavelli points out:

“How perilous a thing it is to put one’s self at the head of changes whereby many are affected. How difficult to guide and bring them to perfection, and when perfected to maintain them.”

_The Discourses_

“Let it be noted that there is no more delicate matter to take in hand, nor more dangerous to conduct, nor more doubtful in its success, than to set up as a leader in the introduction of changes.”

_The Prince_
Step three – Research best practice

Part of taking control – and step three on our journey - is to make sure you do truly understanding contemporary best practice. Even by being here in Boston, you’re showing commitment to that. But let’s try a little test.

Take APMP’s Body of Knowledge, launched almost two years ago now with a wealth of best practice – the fruits of thousands of hours’ effort by many of the leading practitioners of proposal best practice in the world:

- Stand up if you’ve ever looked at it
- Stand up if you’ve spent more than three hours looking at it
- Stand up if you’ve read most of it
- Stand up if you’ve read all of it.

Here’s Machiavelli:

“A prince ought to have no other aim or thought, nor select anything else for his study, than war and its rules and disciplines…. The first cause of losing is to neglect your art; and what enables you to acquire a state is to be master of your art.”

The Prince

Or, from his novella ‘Belfagor Arcidiavolo’, published posthumously in 1549:

“The cleverest leaders, even the most powerful among them, are always sure to obey the laws and are most likely to heed the judgment of others.”

Belfagor Arcidiavolo
Step four – Secure a senior sponsor

We’ll come back in a moment to ‘the judgment of others’: it’s critical on our journey. But at about this stage, if not before, it’s critical that we find ourselves the right sponsor:

“It is unwise to ally yourself to a prince who has reputation rather than strength”

*The Discourses*

In our experience, the most successful change projects are those which secure the buy-in early on of the most senior stakeholders in the business – whether this be your CSO (Chief Sales Officer – or Senior VP of Sales, Business Development Director, or whatever their job title happens to be), or even (and better) the COO or CEO themselves.

Aim high:

“Act like the clever archers who, designing to hit the mark which yet appears far too distant, and knowing the limits to which the strength of their bow attains, take aim much higher than the mark – not to reach by their strength or arrow to such a great height but to be able with the aid of so high an aim to hit the mark they wish to reach.”

*The Prince*

And remember: it’s visible and practical support you need: true sponsorship, not just a passing nod to what you need and are trying to achieve. Machiavelli again:

“A prince may avoid the appearance of ingratitude by himself leading military campaigns, as the early Roman emperors did and at the Turk does now; because when it is the prince himself who conquers, the glory and gain are all his.”

*The Discourses*
Find the right sponsor, and they’ll be your biggest advocate – staking their own reputation on delivering success through your project. And they’re probably more Machiavellian than you – so will know that:

"Nothing is of greater importance than knowing how to make the best use of a good opportunity when it is offered."

The Art of War

So, out of interest: who would you say is currently your sponsor and champion within the business. Hands up if it’s:
- Your CEO
- One level below the CEO
- Your own boss

Anyone else – hands up if you’ve not got a sponsor above you who ‘gets it’ right now?

**Step five – Draw on wise counsel**

But will they listen? And how do you get their support?

"Those who walk almost always in paths beaten by others, and who follow by imitation their deeds, are yet unable to keep entirely to the ways of, or attain to the power of those they imitate. A wise man ought always to follow the paths beaten by great men, and to imitate those who have been supreme, so that if his ability does not equal theirs, at least it will savour of it."

The Prince

I frankly don’t care who you turn to, but change is more likely to happen if an organisation does turn to someone who can help steer you along the path. That can be someone you meet here at the conference; instead, in too many cases where things drift without a sense of the need for continuous improvement in your bidding DNA, it ends up being that new Head of Bids & Proposals appointed from outside.
So, show of hands time again: who in the room would say that they currently have some form of external mentor or advisor to offer them wise counsel?

After all, never forget that you’re the person who’ll take the credit for the wise words that others put into your mouths:

“The first opinion which one forms of a prince, and of his understanding, is by observing the men he has around him; and when they are capable and faithful, he is always considered wise.”

_The Prince_

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**Step six – Understand the status quo**

What works well today? What less so?

“Prudent men are wont to say... that he who would foresee what is to be, should reflect on what has been, for everything that happens in the world at any time has genuine resemblance to what happened in ancient times.”

_The Discourses_

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Let’s do a rough straw poll. If I asked you to rate your organisation’s current proposal capabilities on a scale of zero to ten, what score would you give? Just write it down. And now share your number – just your number: no need for a detailed discussion - very quickly with three people around you. Let’s reflect on what that means:

- Eight or above: maybe your game’s about adopting the latest best practice to stay ahead of the competition
- Five to seven: perhaps it’s about building on the good stuff already happening, and turning your proposal capabilities into a true source of competitive advantage
- One to four: perhaps there’s the need for radical change
- Zero? Hey, sorry: I’ll buy you a stiff drink in the bar later so you can drown your sorrows.
Who are your stakeholders? What do they think? Getting them on your side from the start simply has to be a must:

“Men fighting in their own cause make good and resolute soldiers.”

*The Discourses*

And who might your enemies be – those with vested interests, whose main passion is to continue in their current, comfortable modus operandi:

“He who innovates will have for their enemies all those who are well off under the existing order of things, and only lukewarm supporters in those who might be better off under the new. The result is that whenever the enemies of change make an attack, they do so with the zeal of partisans.”

*The Prince*

Yet, of course, what makes them “well off” are probably the very things that are inhibiting you from truly striving for excellence. Ever heard a colleague say: “But we’ve always done it this way” – when you know that ‘this way’ is at the heart of the problem.

Getting close to them might help. To quote ‘The Prince’:

“Problems arise when a prince acquires new possessions in lands having different languages, customs and laws from his own. Keeping these states requires much good fortune and diligence. Often the best solution in this case is for the prince to go and live in this new state... For when you are on the spot you see difficulties as they arise and remedies that may be readily applied.”

*The Prince*
Step seven – Build your target operating model

Incremental change is great, if what you’re doing now works pretty well. Often, though, it’s a more fundamental rethink that’s needed. I’ll give you just one example from last December: a team in the professional services market, with aspirations to provide a significantly more strategic and successful service to their sales colleagues. They’d worked out that, to do the right things right, they needed to invest 30 days’ effort per deal – from the pre-proposal phase through to the pitch – for each of their hundred deals per year. 3,000 days. And there were four of them in the team. You know, my business card says “Proposal Manager”, not “Miracle Worker”.

To quote Machiavelli:

“A new prince of a province of which he has taken possession ought to make everything new. He should remake all the institutions of the state; create new magistracies with new names; confer new powers; employ new men; raze existing towns and build new ones, removing the inhabitants from one place to another.”

The Discourses

So you need to build a clear model of how this is going to work in future – whether that be through smaller high-impact projects, or (perhaps better) a more radical review. For what it’s worth, if it helps, we tend to look at four key areas:

- the processes being followed
- the structure, remit and capacity of the proposal organisation
- the way in which the right people, with the necessary skills, are engaged on the right deals – remembering my colleague BJ’s immortal phrase: “Availability is not a skill”
- the availability of the resources needed to bid successfully – templates, training, pre-written content and more.

And, at the same time, you need to make change palatable, with a robust transition path that people can appreciate and adopt:

“He who would reform the institutions of a free state must retain at least the façade of the old ways... although, in truth, the new order differs altogether from that which it replaces. People often judge more by appearance than by reality.”

The Discourses
It’s all about winning hearts and minds – even when you’re still filling in the detail of exactly how things are actually going to work. Our sixteenth century friend, again:

“Occasionally words must serve to veil the facts.”

*The Prince*

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**Step eight – Communicate and educate**

I can never emphasise enough our old mantra that “all those involved in proposals must be trained in the necessary skills” – and that’s never more true than when you’re implementing change. Indeed, educating people to view proposals more strategically, and equipping them to play their part in the process more effectively, often sits at the very heart of any change programme.

So you’ll need to be passionate about your subject – to capture hearts and minds, even amongst those who may be cynical:

“The best fortress which a prince can possess is the affection of his people.”

*The Prince*

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Indeed, if you can find some advocates to champion your cause and speak out on your behalf, that’s a big help:

“As a prince cannot always help by being hated by someone, he ought to make sure that he is not hated by everyone.”

*The Prince*

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And, of course, this is Machiavelli, after all:
“He who wishes to secure himself in his new principality must win friends, must overcome all obstacles either by force or fraud, must make himself beloved and feared by the people, must be followed and revered by the soldiers, must exterminate those who have power or reason to hurt him, and must exchange the order of things for a new order of his devising.”

_The Prince_

Step nine – Work hard for quick(ish) wins

It’s critical that you take your new operating model off the page, and into reality. Working hard to identify potential quick wins is essential: a few quick, visible success stories will build momentum for you, as people live and breathe the new ways of working.

“People intrinsically do not trust new things that they have not experienced themselves.”

_The Prince_

Maybe incubate a few deals, where you know you have a good chance of success. Throw more (and more expert) resource than usual at them, giving yourself the luxury of a little extra bandwidth to make sure you can do the right things in the right way.

Perhaps there’s design. When it comes to a proposal, people see what it looks like before they read what it says. Or, as Machiavelli commented:

“The ordinary people always judge by appearances, and the world consists chiefly of ordinary people.”

_The Prince_

So, perhaps, radically improving the look and feel of a few documents might help build traction.
Where your change spans multiple business areas, we’d usually suggest you **pilot** the new approach with one before scaling or rolling out more widely. Perhaps, even, where there are areas who really don’t want to play ball, you decide on which Machiavellian tactic to adopt:

> “When a newly acquired State has been accustomed, as I have said, to live under its own laws and in freedom, there are three methods by which it may be held. The first is to destroy it; the second to go and reside there in person; the third, to suffer it to live on under its own laws, entrusting its government to a few of the inhabitants who will keep the rest your friends.”

*The Prince*

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### Step ten – Learn, adjust and embed

Hands up if you’ve tried to change something in your proposal process in the last year? And keep your hands up if it worked absolutely perfectly and to plan. Right: there are times when we need to fine tune our approach as we go. In Machiavelli’s world:

> “The promise given was a necessity of the past: the word broken is a necessity of the present.”

*The Prince*

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Let’s be bluntly realistic: you won’t get everything right first time – and you’ll find it disheartening at times, as others try to hold onto their old ways:

> “The way in which we live, as opposed to the way in which we ought to live, are things so wide apart... Anyone who would act up to a perfect standard of goodness in everything must be ruined among the so many who are not good.”

*The Prince*
And that's good. I'd rather you tried one hundred things and eighty worked, than twenty and all were successful, for you'll be delivering so much more. It's all about watching how things go in practice, fine tuning the approach – and celebrating the well-intended initiatives that don't quite work, rather than getting despondent:

“The Romans were more lenient than others in punishing the captains for the failure of their armies. If they erred through ignorance, so far from punishing they even honoured and rewarded them.”

*The Discourses*

And now, perhaps, is where Machiavelli's ruthlessness might be brought into play. For we need to move beyond seeking out and promoting consensus; showing the benefits of new ways of working – from the carrot to the stick:

“The temper of the multitude is fickle, and while it is easy to persuade them of a thing, it is hard to fix them in that persuasion. Whereas, matters should be so ordered that when men do not believe of their own accord, they may be compelled to believe.”

*The Prince*

And this is where your executive sponsor may be needed to make sure people toe the line:

“One can say this in general of men: they are ungrateful, disloyal, insincere and deceitful, timid of danger and avid of profit. Love is a bond of obligation that these poor fools break whenever it suits them to do so; but fear holds them fast by dread of punishment.”

*The Prince*

Hey, people don't use "Machiavellian" with no reason!
The summary of the plan

So, to recap. A ten-step plan to driving improvement in our organisations’ bid and proposal capabilities – with our tactics at each stage supported by our Renaissance friend:

Step one  Recognise the need for improvement
Step two  Take accountability
Step three  Research best practice
Step four  Secure a senior sponsor
Step five  Draw on wise counsel
Step six  Understand the status quo
Step seven  Build your target operating model
Step eight  Communicate and educate
Step nine  Work hard for quick(ish) wins
Step ten  Learn, adjust and embed

You know, I rather think he’s had a bad press over the years, old Machiavelli. Sure, there’s a darker, more ruthless side to what he wrote – I’ve left out most of the stuff about crushing enemies and executing opponents - but then we’re trying to improve our organisations’ proposal capabilities, not rule over a sixteenth century European state!

You know there are people all around you in this room who are doing wonderful stuff. These few days represent a fabulous opportunity for us all to embrace still better practice, and then to conspire, connive, confound expectations of those internally who are reluctant to aspire to the heights we know we can achieve.

Ladies and gentlemen: let’s all go out and make Machiavelli proud! Thank you for your time.