

The Proposal Magic Wand

A white paper, based on research into hot topics facing UK heads of bid and proposal management

Innovative proposal design, stronger knowledge management, increased staffing and more training top the wishlist of UK proposal teams.

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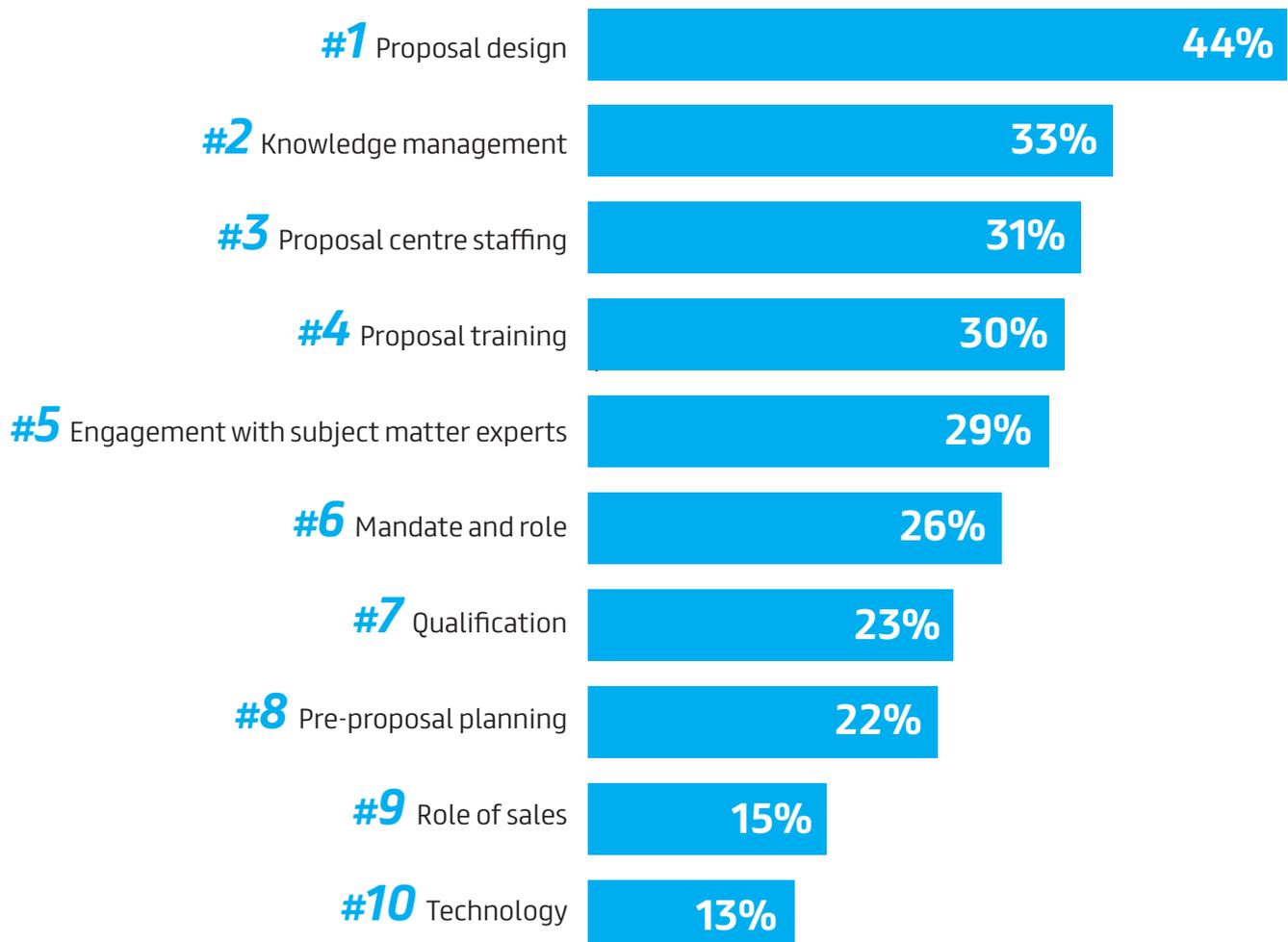
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The Proposal Symposium, hosted by Strategic Proposals in London on 6th March 2015, brought together nearly a hundred of the leading lights of the UK bid and proposal profession, from a wide range of sectors. One of the exercises - "The Proposal Magic Wand" - challenged participants to think about three things they'd do to improve the proposal capabilities of their organisations, if money were no object.

So, what's on Proposal UK's current agenda?

the top 10



#1

Proposal design

Goodbye drab: hello distinctive!

People see what it looks like before they read what it says – and top of the list, mentioned by 44% of attendees, came the need to improve proposal design. It's an area in which we've seen huge change in recent years: if your proposals look today anything like they did three years ago, I can guarantee that they're behind the curve.

There's the need for skilled, specialist resource ("a graphics designer", an "in-house graphic design team", "specialist graphic designers" and numerous variations on the theme). Some currently use external resource and would prefer to have "a design team in-house"; others would like to head the other way and find a "design agency". And whoever's doing your design needs the tools of the trade, too – not just for bringing layout and graphics up to contemporary standards, but also for "animation"

and "multimedia", giving you "the ability to use innovative new forms of media to help us submit bids that capture our customers' attention".

This is, of course, despite too many buyers' attempts to dumb down proposals to the lowest common denominator with their infernally designed online portals. ("Customers get the suppliers they deserve.") But if you're submitting anything other than plain text, and ever have the chance to get face-to-face in front of the client – then wherever you are today in terms of the look and feel of your campaign collateral, if you're not already planning to be somewhere radically more advanced, you're not responding quickly enough.



innovative new forms of media that capture our customers' attention"



#2

Knowledge management

Reliable content at the touch of a button

It surprised – and slightly depressed – me to see that knowledge management came next (33%). When I started working on proposals back in 1999, products like Sant and Pragmatech were already commonplace. Yet in these days of Qvidian, Savo and vastly improved CRM tools, it seems that many people’s libraries of pre-written content remain a source of frustration – at worst, still enabling teams to write poor proposals faster. Is your library like this: “in a poor current state and getting worse”, requiring “rewrite and update”?

More and more, we hear recognition that this isn’t about the technology – even if some still cried out for *any* “knowledge base system”. It’s about skilled staff “curating content in real time”; about content being “TRULY up to date”; about having “talented” and “dedicated” “writers who only work on knowledge base content” (recognising that if this is a spare-time job, live deals will always take priority).

It’s about maintaining close links to the relevant “experienced/senior members of the company” who have genuine subject matter expertise, and who recognise their ownership responsibility for content. And libraries need to extend to cover “CVs”, “competitive intelligence” and “case studies”. (When did you last bribe – sorry, incentivise – your salespeople to really build up your arsenal of client references and quotes?)

This “needs resource”: to create or refresh the library (often, with external help to enable an already-too-busy proposal team to break the back of the task); to purchase the tools; to maintain it. But the payback is immense – provided, needless to say, that the content never appears in a final proposal without suitable tailoring to the opportunity in question!



Curating content in real time



#3

Proposal centre staffing

Proposals: still under resourced?

Proposal centre staffing came third (31%), with many of you wanting to move away from having to make the best of an all-too-often bad job thanks to resource constraints.

“Extra team members to allow more time to be spent perfecting proposals rather than rushing through” would be ideal. The need for “a more senior team of more experienced individuals” and a cry for “dedicated professionals” hint that some organisations still perceive proposal management as a glorified administrative function rather than a critical source of competitive advantage.

Do you have a clear capacity model in place? Is the business realistic about how many deals you can support? Do you know where to turn for external help, quickly, to flex at times of peak demand? A culture of “late nights, cold pizza” really isn’t one that leads to excellence, or to retention of the best staff.

a more senior team of more experienced individuals”



#4 Proposal training

Right now, your competitors are training their teams!

“All those involved in proposal development should be trained in the necessary skills.” I can’t remember how many times we’ve said that over the years – and several marvellous presentations at the Symposium highlighted the remarkable benefits that can result.

Perhaps inspired by our speakers, proposal training popped up fourth in the analysis (30%). Let’s pick a few of the participants’ wishes:

- “Proposal training for everybody involved in proposal construction” and “bid and proposal training for sales and the rest of the organisation”. Not just for bid and proposal professionals: you understand the need to evangelise good practices across the wider community internally.
- A “culture of continual personal development and learning”; “regular ongoing, consistent training across the company”; “engagement of support/training on an ongoing basis from an organisation to enhance our capability”. A one-off training exercise can pay huge dividends, but do you push tirelessly to embed and refresh those skills, ensuring they really are applied to help win live deals?

- “Training and qualifications, by person and skill” – recognising that a one-size-fits-all training approach is somewhat simplistic in a world where bid/proposal specialists, senior managers, salespeople and content contributors all have very different needs. (It’s interesting, too, to ponder the role of qualifications in the proposal profession – with APMP’s certification scheme due to be refreshed in autumn 2015, and the groundswell of support behind the apprenticeship and proposal writing assessment schemes we discussed at the event.)

Thanks, by the way, to whoever name-checked Strategic Proposals’ training in their response. (We’d love to chat: we rather enjoy this stuff!)

“ Proposal training for everybody involved in proposal construction”

#5

Engagement with subject matter experts

The right experts: ready, willing and able

In fifth place (29%) came the need for better engagement with subject matter experts. You want them to be “enthusiastic”. You want them to be “professional”, “working together as a cohesive team”. Frankly, some of you just want them *there!*

There’s certainly a focus in the replies on wanting to create a professional cadre of “work winners” – perhaps (mentioned by a few of you) via “secondments” – with, for example, “technical staff dedicated to central bid team

for 12 months, [as a] key part of their leadership development programme, available 100% to support deals”.

However you tackle the challenge of engaging the right resource in a timely way, never forget: availability is not a skill!





“The Proposal Magic Wand” challenged participants to think about three things they’d do to improve the proposal capabilities of their organisations, if money were no object.





#6

Mandate and role

A source of competitive advantage?

The mandate and role of the proposal function came next (26%). You want to be seen as a professional “practice”, not merely a “team”; to create a “proposal-building centre of excellence”, perhaps with “a clear Service Level Agreement”. You’d love to gain “commitment from stakeholders” to “embark on a best practice initiative to set standards across the company”. You recognise – as have many of our most successful clients over the years – that true leadership requires “vigour and sponsorship”, “passion and drive” and “buy-in” “from the board”.

It requires focus – and a need to “take away the distractions of non-bid work”. And it won’t happen by chance.



Here’s a challenge: if you struggle to be taken sufficiently seriously, who are you going to win over, when, and what are you going to do to trigger the change?”

#7

Qualification

Stop chasing lost causes!

When I present at APMP chapter events around the world, one topic above all others is guaranteed to attract huge audiences: qualification. It was therefore no surprise to see this mentioned regularly (23%).

You need an “even more stringent”, “bulletproof”, “robust no-bid process”; you recognise that to no-bid requires the right “culture” and needs people to become “more comfortable in declining bids”.

If you find yourself working on opportunities that you’re not confident you’re going to win, or qualify in to a supposedly “must

win” deal but find that the cavalry doesn’t show up to help you capture it, then it’s time to get more serious at this critical stage.

And, as two of our speakers pointed out on the day, a well-handled and strategic no-bid can actually sometimes lead to more incisive dialogue that changes the client’s entire approach to a project, thus helping you to win.



#8

Pre-proposal planning

Seizing the initiative

In my closing presentation at the Symposium, I talked about how the most successful proposal functions spend less and less of their time responding to RFPs – and more and more on renewal proposals, proactive documents and pre-proposal planning. This charted at number eight (22%).

You're crying out for "earlier engagement", at the "latest six months before"; you want "more notice", with "better visibility of upcoming pursuit activity" from a robust "system to track opportunities before they become bids".

You want the "ability to influence the RFP before it is written", ensuring that you're playing on your terms, not your competitors'. Home advantage matters!

You want colleagues to "understand the importance of pre-pitch planning and their responsibilities", with "a full analysis to be completed" "ahead of every RFP". As one of our speakers observed, the RFP happens half way through the client's procurement cycle; if the first you know of most of your projects is the arrival of their questions, you're aligned incorrectly.



#9

Role of sales

Sales and proposal teams in partnership

Salespeople. Love them. Hate them, at times? Our job: to make their life easier (taking tasks off their shoulders that aren't their core competence or regular routine). But it's also to make their lives more difficult – asking those probing questions, pushing them for true insights into what is, after all, their customer and their opportunity. (My current favourite: “What do you know about this project that our competitors don't?”).

So optimising the interface to and role of sales in the proposal process came, not surprisingly, relatively high (15%). “We're on the same side”; we want them to “engage properly” and fully “understand the customer's requirements”, and to have strong “customer relationships” where they genuinely “understand the customers' hot buttons”. We want them to be “more organised”, and have “better industry knowledge” – and, particularly, to be sharper with their insights into “existing contracts”.



understand the importance of pre-pitch planning”

#10

Technology

Tooled up

Technology made the final spot in your top ten (13%). More of it; more “up to date”. “Decent, integrated” tools for “virtual solutions and team collaboration”. One of you wanted “web access” (yikes: that really is a basic!). Another simply said: “Make MS Word work”! (Hey, Bill Gates has been trying to do that for years!). Having spent a fair amount of time with my own team in the past couple of years sharing

knowledge through Yammer and using better collaboration tools, I see huge potential for better technological solutions for proposal teams: I just don’t yet see any technology providers yet grasping the initiative with a truly coherent solution. (It’s a topic we’d love to explore, by the way, if any of you fancy forming some sort of informal working party).



#11

Proposal writers

Professional wordsmiths at the ready

Your proposals should be “a joy to read”, as my dear friend and collaborator BJ Lownie (who founded Strategic Proposals back in 1988) has long and memorably observed. And the need for skilled proposal writers was mentioned by 13% of you.

Whenever I’ve run proposal centres, I’ve always hunted out the best writer-editors: the impact they have on documents is so immense. They breathe life into your story, helping to make your content flow more elegantly on the page: engaging, conversational, compelling, with momentum.

You’re after “professional writing” from “trained, focused individuals that can gain the best from subject matter experts” – not just bid managers who are reasonably adept with the written word. They’re not easy to find: ours are (happily) in constant demand. But if you’re not using “dedicated” resource to craft your text, your documents will suffer in comparison to those of your competitors. I confess that I’m convinced that the 87% who didn’t mention this already have the necessary expertise in their teams – rather than, perhaps, not yet understanding its (increasing) importance.



#12

Benchmarking

Knowing where you stand

I discussed benchmarking at the event: how we see organisations not only using it to identify how they might reach out for best practice (and command the necessary sponsorship and resources), but also to push themselves to stay ahead in their sectors.

Twelfth in your survey (11%): “annual, independent benchmarking to identify strengths and development opportunities”, aligned to the need for a structured, independent programme to capture “regular feedback from customers’ evaluation teams on our proposals”.



A nd there's more...

What else came up? There was a big gap from our top dozen to the other topics raised, each cropping up on only a handful of forms.

Superbly articulating a compelling story

Improved proposal strategy development would help some – especially sharper “knowledge of competitors’ weaknesses”. The need for better peer review of proposals, with access to “procurement experts” was mentioned too. Frankly, I’m surprised that the so-called ‘red team’ didn’t feature more prominently: our experience is that the right reviewers will improve your evaluation score and chances of success very significantly, for not much effort or cost.

But it's all their fault...

You want the procurement profession (and, at times, I use the word ‘profession’ lightly) to improve their RFPs, ensuring that they “focus on how we are going to do the job, not on meeting their corporate requirements”. And you’d love to “change government procurement processes, removing complexity and cost” (at a time when, it could be argued, the trend is in the wrong direction).

Scintillating proposal presentations

Proposal functions are increasingly staying engaged to help the sales team bring the written document to life in a first-class proposal presentation – an area where we’ve been playing more and more of late. Several of you mentioned the need for “training” in this area, and for “a fab process for presentations (a chance to excel that many don’t take)”. Again, that’s a hot topic for many of our top-performing clients.

Just a few more requests, fairy godmother...!

You want money: “unlimited budget” (!), especially for “training and development, technology and infrastructure”. Research we did a couple of years ago showed that most UK heads of proposal management in large organisations have direct personal control of budgets of under £100k. Back in 2001, I had \$3.2m in my proposal centre’s budget, of which \$2.2m went on staff costs and the rest on discretionary, but well-justified, projects to improve the company’s proposal capabilities. Something has gone wrong, somewhere, on our profession’s journey to seniority, influence and effectiveness.

And, finally, you want “better recording of proposal costs”; “co-located bid teams on all major opportunities”; and a “forum where the bid community can communicate best practice”. (Perhaps we should set up a virtual Symposium for invited friends to swap ideas in confidence on an on-going basis. Any takers?)

The journey to success

So much to do, for so many teams. But let's not beat ourselves up: if a topic was mentioned by 25% of those present, then (trying to be positive) 75% of folks didn't think it was amongst their top three burning issues. Yet never forget: this is a race, and there's no prize for coming second. If you're not working on these things, your competitors very well might be. And that need to stay ahead of the best-of-the-best is what makes proposal management so thrilling.

We'd welcome your comments on the survey findings. And, of course, we'd relish the opportunity to work with you to help address any of the challenges that you're trying to resolve. There's not much in here that we've not tackled before, and helping clients to win more, and win more easily, is what we love doing. You know where to find us if we can help in any way!

Thank you for your participation!

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