Bidding to Win

Key tips for winning tenders

RESULTS THROUGH EXPERIENCE

Introduction

- Topic for today - ‘bidding to win’
- Format - tips, examples, stories and discussion

RESULTS THROUGH EXPERIENCE

"A good written proposal might not, in itself, win you the business. But a badly conceived and **badly written** one may put you **out of the race**"

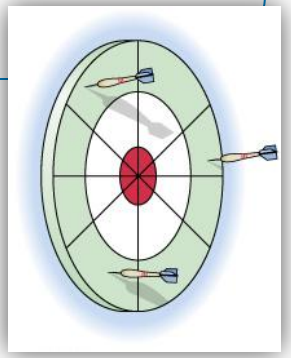
- Director of Procurement, Construction Sector

RESULTS THROUGH EXPERIENCE

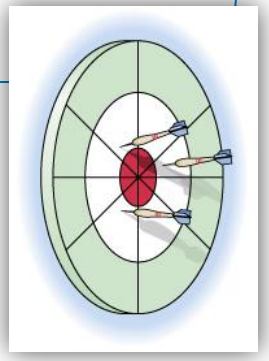
Bid approach

AVERAGE → BETTER → BEST

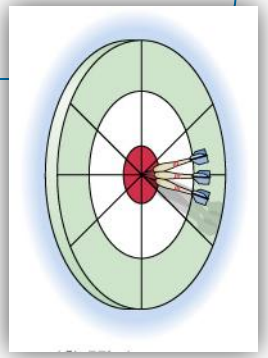
- Focus: 'Get them something'
- Done by anyone
- No support
- No strategy
- Copy direct from brochures or other documents
- Inconsistent output



- Focus: a complete, compliant document
- 'Factory' approach to responding to tenders
- Reactive to RFT
- Chase everything
- Last minute
- Average output



- Focus: Articulate, compelling story
- Identification and alignment of bid team upfront
- Strategic approach – what are the client really looking for? What are our differentiators? Why should they pick us?
- Proactive; planned
- High quality output



Tips for giving yourself the best chance at winning bids

RESULTS THROUGH EXPERIENCE

Be Selective

- Go or no go is the most important step in a bid process
- Don’t waste time and energy bidding for the wrong projects
- Focus efforts in the right areas
- *When it comes to strategy and effort, what is more important than what you do is what you choose not to do*

RESULTS THROUGH EXPERIENCE

EXAMPLE: Go/ No-Go General Considerations

Go/ No-Go General Considerations

These generic considerations aim to provide guidance and questions to ask in undertaking a Go/No-Go assessment for project opportunities.

In making the decision to "GO" for a particular project opportunity we should feel confident that our company has a competitive chance to win the opportunity.

If we choose not to bid then we should, in the least, contact the client and respectfully decline to bid.

Item	Questions	Actions to justify "GO" decision
Company strategy alignment	> Does the opportunity align with our strategy, brand and marketing plan? *(Does it align with the market growth, capability growth needs, specialist services we plan to offer, capacity needs, links to other clients and markets etc)* > If not, why would we go for this opportunity? Will it take resources away from delivering on our strategy or for key clients?	
Client relationship	> Is it a key/strategic client? - If so, consideration should be given to this opportunity vs. NON-Brand client opportunities. *(Similarly, "valued client" opportunities vs. "opportunistic" projects)* > Does the client know/understand/value our capability relevant to this opportunity? What is our reputation with the client for the type of work associated with this opportunity? > Will the client expect us to bid? > How have we performed for the client previously, and if so was it successful? Do we have any skeletons in the closet?	
Competition	> Is this a sole-sourced opportunity? *If yes – Go for it. (ensuring it doesn't compromise other key strategic client opportunities/activities)* > Is it a select tender? Who are the competitors - why would they win the opportunity over us? Can we counter? > Is it open tender? Justify why we should tender?	
Capability	> Do we have a Project Manager? *If not – consider No-go. (The client should be confident in this person's ability to deliver projects)* > Do we have the capability for this project opportunity? Can we clearly show to the client we can do this work? *Just because we don't have the capability in a particular area of the opportunity does not mean we should not go for it.* > Do we need to partner with someone, engage sub consultants or recruit to support the opportunity and particular capabilities?	
Capacity	> Do we need the work to improve billability or backlog, do we have idle resources? > Would this opportunity stretch us relative to future pipeline and current workload? *(If key strategic client opportunity we should make every effort to submit a proposal - this may mean dropping other project opportunities)* > How can we resource the project in other ways? *Maybe manage and outsource/sub-contract.*	
Silver bullet	> What silver bullet can we offer - to provide an edge over our competition? > What is it that we can offer to the client that differentiates us from our competitors? *This relates to strategy - the way we will deliver the solution for the client, that assists in addressing the issues the client has/or need for the project.*	
Proposal management	> Do we have a committed proposal manager? *(Note: the proposal manager takes on all accountabilities for the proposal, they don't have to do all the work, but ensure it gets done)* > Do we have the resources to support the development of a worthy proposal? > Can we deliver a quality proposal on time, ensuring all business procedures are followed? Can we ensure that it will not negatively impact upon internal/external clients? > Proposal Budget versus Project fee - is it worth the effort?	
Contractual/ commercial considerations	> Have contract terms been agreed previously? Is a full contractual review required? > Are we likely to agree on contractual terms? *If not, No-Go.* > What is the commercial risk associated with this opportunity? > Can we prepare a competitive bid? Do we know what the client's budget is? *There is no point us bidding if we are not competitive or can't offer a value-add product.* > What is the expected proposal cost relative to the project return? Is this a loss-leader opportunity? Is this good use of our proposal dollars?	
Project scope	> Is the project scope well understood, or is it vague? *Do our competitors have a better understanding of the scope than us? If so then maybe we shouldn't bid.* > Did we know about this project prior to tender release, was this a Strategic Pursuit? Would competitors have a head start over us? *(Unless probity prohibits - we should always aim to speak with the client if possible. Even once released let's try and talk to the client.* > What risks does the scope potentially present that we may need to manage and hence may make the project commercially risky?	
Approvals	> Is the opportunity international or does it trigger particular corporate risks, hence requiring approval from the appropriate manager/executive? > What is the timeframe for the approval process – will it be approved in time for tender submission? *If not, then No-Go.*	

EXAMPLE: Go/ No-Go Decision Matrix

Example of a Go/ No Go Decision Matrix

1. The matrix should typically be filled out by at least three people who are familiar with the proposal opportunity.
2. For each proposal factor, record an estimated rating from 1 to 6 based on the decision criteria provided. You may choose to do the same for a prominent competitor or two.
3. The "Overall Rating" should be at least 4 before deciding to submit a proposal.
4. If the overall rating is less than 4, appropriate management approval should be obtained before proceeding with the proposal.

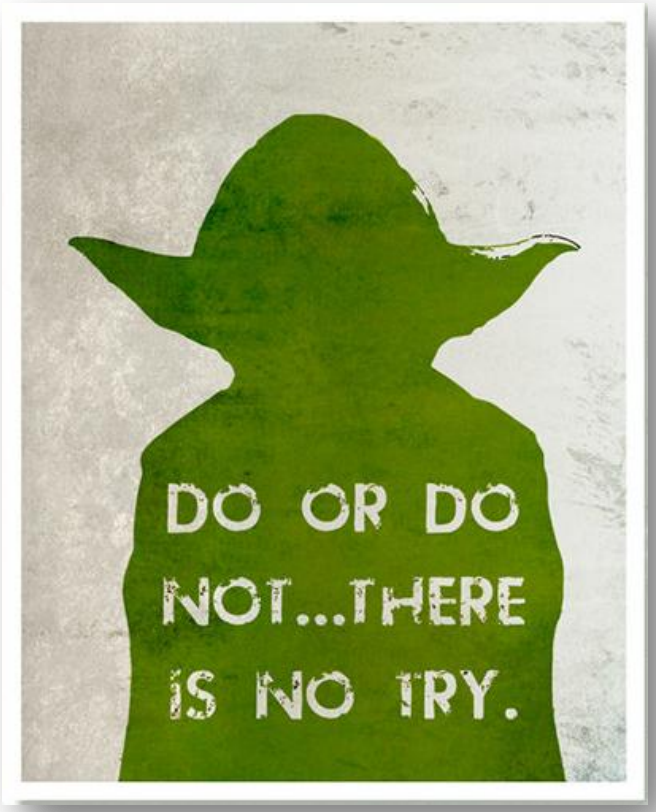
Proposal Factors		*Decision Criteria*						*Estimated Rating*		
		Negative		Neutral		Positive		Our Firm	Competitor A	Competitor B
		1	2	3	4	5	6			
1	Client Relationship & Project Manager	(Virtually) Unknown to client, unknown PM, bad relationship		Known to client but not very well known, client aware of PM		Well-developed relationship with client, PM known to client				
2	Consistency with Strategic & Marketing Plan	Pursuit inconsistent with strategic & marketing goals		Pursuit fits within strategic & marketing goals		Pursuit is essential to achieving strategic & marketing goals				
3	Competitive Advantage	Competitor is strongly favoured		Open competition, no clear favourite		Our firm in favourable position for winning				
4	Capability (Knowledge and Experience)	Marginally qualified, limited or no relevant experience		Adequately qualified but no real edge over competitors		Technically superior to most competitors				

OVERALL RATING (total score divided by 10)			
COMMENTS:	**DECISION:** ☐ GO ☐ NO GO		

RESULTS THROUGH EXPERIENCE

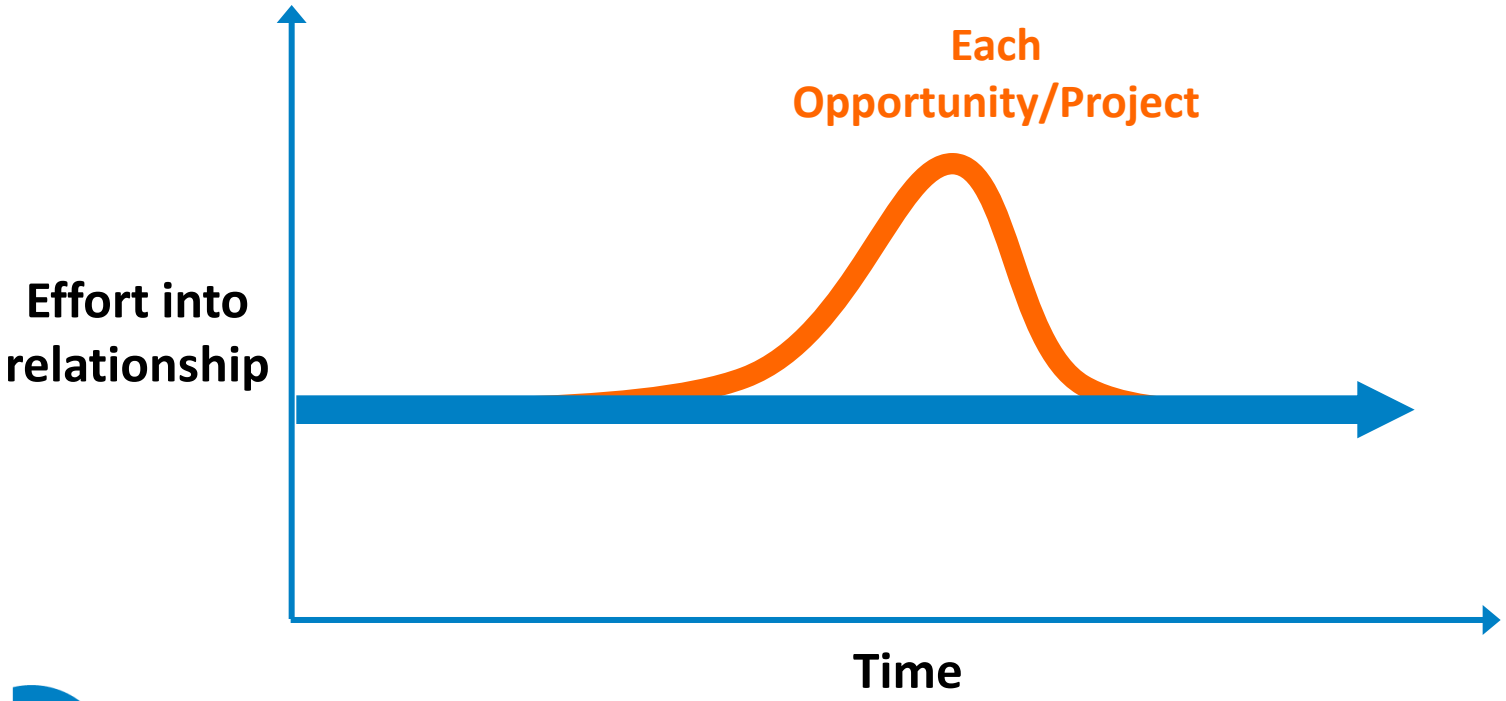
2 Upfront Effort

- If it is worth your effort to bid, it is worth your best shot
- Plan
- Bid Strategy
- Upfront alignment



RESULTS THROUGH EXPERIENCE

Relationships require effort



RESULTS THROUGH EXPERIENCE

Ask Questions

- Don’t assume you know what the client wants
- Ask questions / clarify
- Try and understand the ‘why’ not just the ‘what’
- Use the pre RFT or EOI stage to really understand what they are looking to achieve

RESULTS THROUGH EXPERIENCE

Types of relationships

Earning trust
Building relationships
Giving advice freely

Trust

Relationship

Needs

Service offering

Breadth of business issues

Depth of personal relationship

RESULTS THROUGH EXPERIENCE

Overview of client

Understand what the client really wants and needs and **ASK QUESTIONS** before the RFP or EOI is issued wherever possible

RESULTS THROUGH EXPERIENCE

Tell a Story

- Make sure your bid conveys the right information
- Challenge: multiple authors
- Ensure story flows
- Answers real questions
- Why us?

RESULTS THROUGH EXPERIENCE

Tell the client your story

Outline:

- **Issues**
- Your **strategies** to resolve these issues
- **Demonstrate your capability** to carry out strategies
- **Benefits to the client**

- Establish a structured, flowing approach
- Be engaging and persuasive
- Rehearse, rehearse, rehearse!

RESULTS THROUGH EXPERIENCE

ISSUE

What are the client's issues? These are our key messages – need to align

STRATEGY

What's the strategy/the how – as to how we will solve/resolve this for them and deliver

EVIDENCE

Where has the team done this before? And how does it apply to this work?

BENEFIT

What is the benefit to the client?

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RESULTS THROUGH EXPERIENCE

The details matter

- Copy & Paste is not always your friend
- Make it specific / relevant to the job / client
- Conveys professionalism

RESULTS THROUGH EXPERIENCE

Distinguish your promise to the client

Choosing us will deliver world-class experience, demonstrated capability in the industry and a project team deeply committed to deliver a successful project within budget and schedule

RESULTS THROUGH EXPERIENCE

Distinguish your promise to the client

- What differentiates you from your competitors?
- An overall theme to your presentation
- One smooth sentence which sets **you** apart from your competition
- Tells the client the **specific** benefits that you promise to deliver on the project
- Amaze the client with your

understanding of their project!

*Always **quantify** the benefits to the client*

RESULTS THROUGH EXPERIENCE

Think about the future

- Don’t just prepare to win the bid; prepare for how you will deliver the project
- Prepare yourself; set yourself up for success
- Put yourself in good standing for future work

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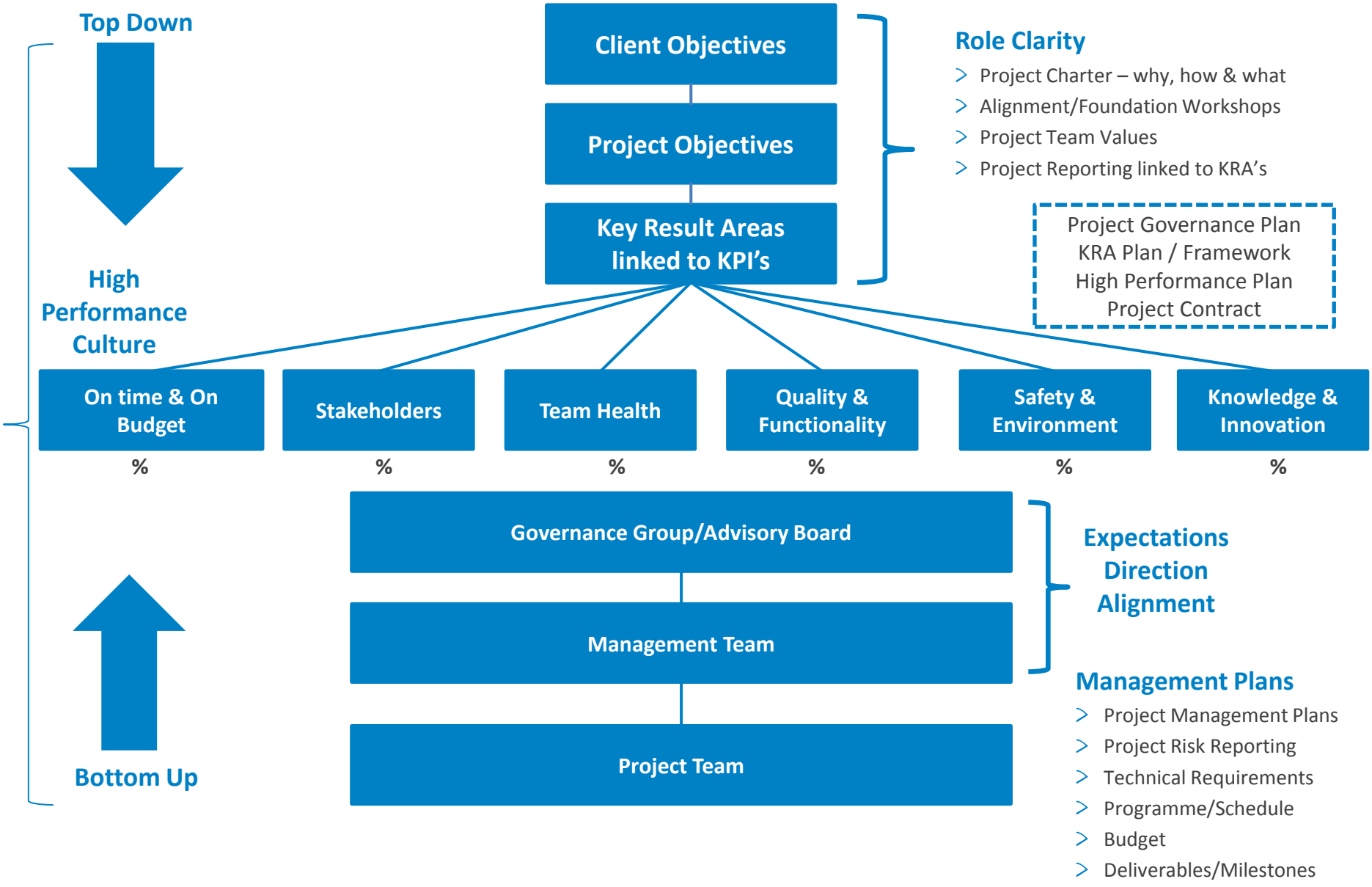
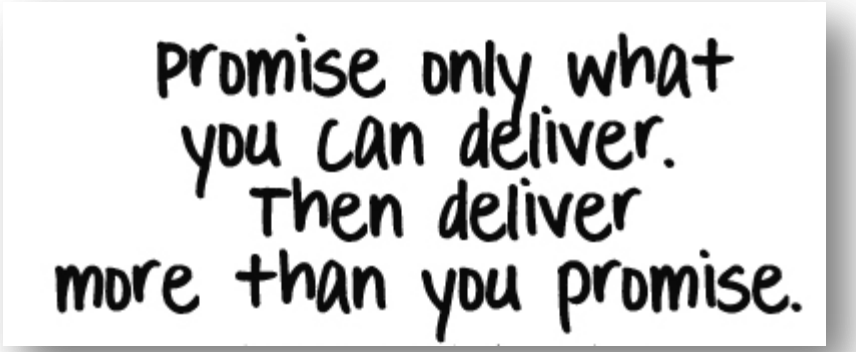
RESULTS THROUGH EXPERIENCE

Project Governance – Top Down and Bottom Up



Be prepared to deliver on what you promise

- If you've promised things before and not delivered it will be held against you
- Long term success depends on long term relationships
- Good delivery puts you in good stead for future work

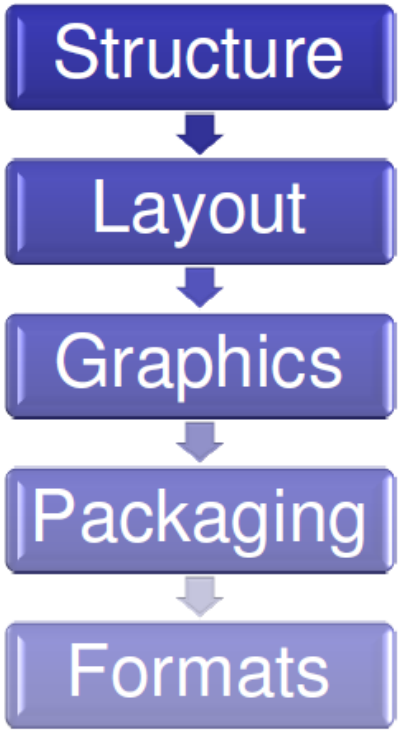


RESULTS THROUGH EXPERIENCE

HIGH PERFORMANCE PLANNING

Make Evaluation Easy

- Understand the evaluation criteria
- Make it hard for them to not shortlist you
- Understand the client's objectives and drivers
- Answer the questions and link it back



RESULTS THROUGH EXPERIENCE

Demonstrate your capabilities

Highlight your capabilities to the client through past successful projects, client testimonials, financial information etc.

Leverage the relationship with the client, and build on the client's knowledge of the project manager and team

Demonstrate you can solve key issues brought up by the client through your strategies for risk mitigation and removal

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RESULTS THROUGH EXPERIENCE

Align Everyone Involved

- Make sure everyone on the bid team is on the same page
- Prepare thoroughly for any client interactions
- Show that you are prepared and dedicated to this job and this client

RESULTS THROUGH EXPERIENCE

Prepare for the client interactions

- What are the key elements? Purpose?
- Allocating time to what matters
- Who attends (why are they here?)
- What do they do in the presentation?
- How are you going to present?
- Talking and listening
- How are you going to handle questions?

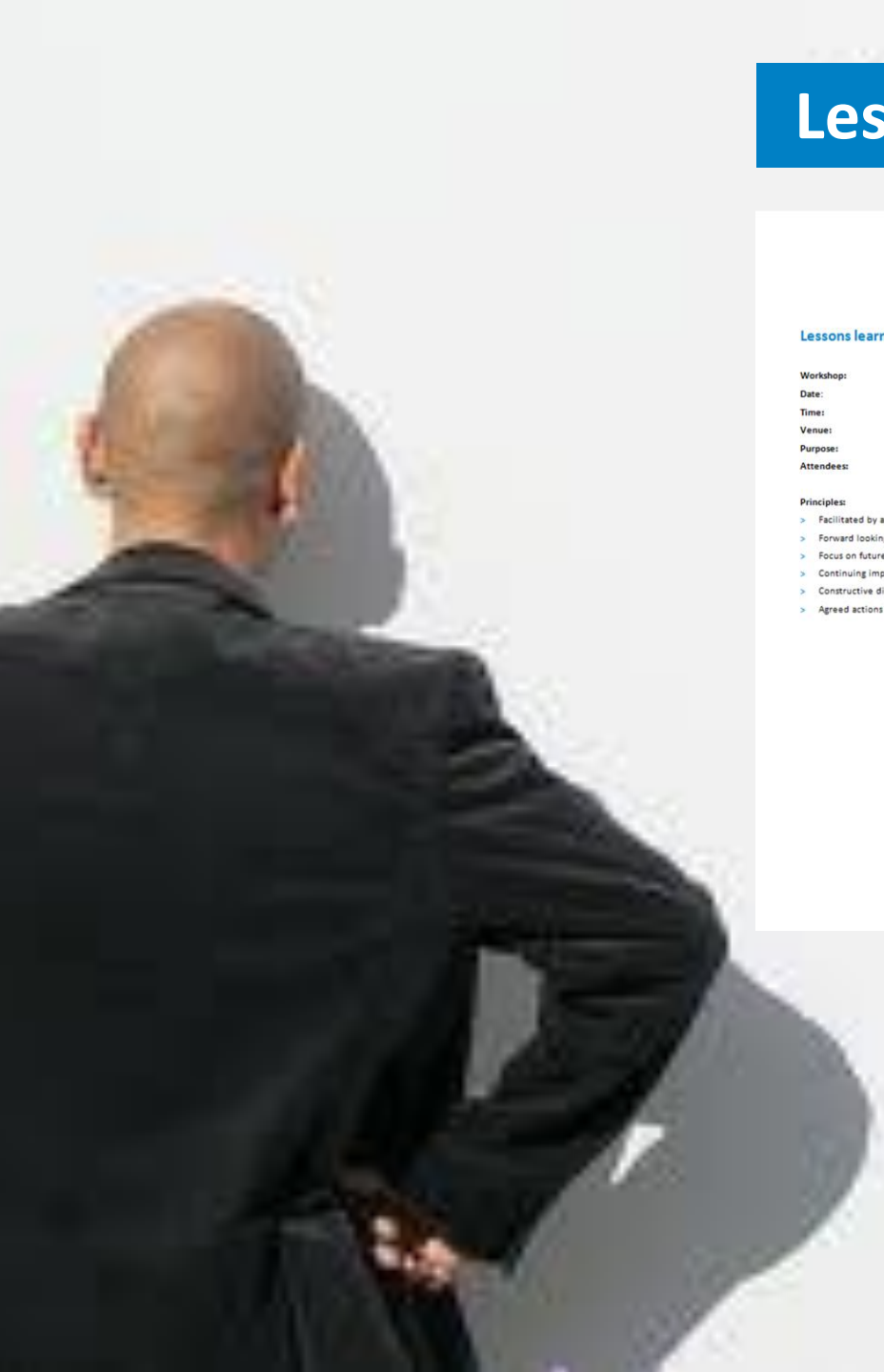
RESULTS THROUGH EXPERIENCE

Learn & Improve

- Learn from your mistakes
- Client debriefs – how can we do better?
- Internal learning
- Study – look at how other projects / organisations have achieved success

RESULTS THROUGH EXPERIENCE

Lessons Learnt Workshop Agenda



Lessons learnt workshop agenda

Workshop: Lessons Learnt
Date: Click here to enter a date.
Time: [Workshop Time]
Venue: [Venue]
Purpose: [Purpose of Workshop]
Attendees: [Attendees]

Principles:

- Facilitated by an independent facilitato
- Forward looking
- Focus on future relationship between [
- Continuing improvement on project de
- Constructive discussion using positive q
- Agreed actions for future projects

Time	Item	Agenda Item	Presenter	Time allocated
0900	1.	Welcome (coffee upon arrival) > Introductions	Chair	5 mins
0905	2.	Opening statements > Summary of the project brief > [Client] experience (key points) > [Client] experience (key points)	Facilitator	10 mins 10 mins 10 mins
0935	3.	**Areas for Consideration – Design** a) Project Start-up review (technical and contract) > Client Project Brief > Bid > Proposal > Project Planning b) Communication > Internal > External c) Client satisfaction d) Project outcomes e) Schedule f) Risks & Safety g) Technical results > Design management > Delivery process (internal & external) > Quality > Review (peer, independent, client) > Reporting h) Commercial results > Budget > Variations > Margin > Invoicing i) Construction j) Other **Learning for each Are** 1. Did it work? 2. What worked well 3. What could've wor better? 4. What can we do t better next time? **Assessment criteria:** > "Met or exceed expectations..." > "...Fell short of expectations"		
1135	4.	Lessons Learnt: Review		
1155	5.	Actions: Review		
1205	6.	Closing Statements		

Lessons Learnt

Item	Lessons Learnt	Comment
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		

Actions

Item	Action	Owner
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		

Any questions?

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