

# Contents

Contents	i
The Aim of This Book: Professional Bid and Proposal Management	1
Part I: Successful Bid and Proposal Management Organisation	9
1 Professional Proposal Management Organisation with Flexible Role-Based Model	16
1.1 Typical Tasks and Roles in Bid and Proposal Management	16
1.1.1 The Role of Proposal Manager or Bid Manager	19
1.1.2 The Role of Sales	22
1.1.3 The Role of Bid or Proposal Support (Bid or Proposal Support Office)	23
1.1.4 The Role of the Opportunity Board	25
1.1.5 The Role of Project Manager	25
1.1.6 The Role of Subject Matter Expert (SME)	27
1.1.7 The Role of Pricing Manager	27
1.1.8 The Role of Contract Manager	28
1.1.9 The Role of Quality Assurance (QA)	29
1.1.10 The Role of Compliance Manager	29
1.1.11 The Role of Finance Manager	30
1.1.12 Other Possible Roles	30
1.2 Organisational Set-Up of Bid and Proposal Management within a Company	32
1.2.1 Temporary or Dedicated Team?	32
1.2.2 ‘Breathing’ Proposal Management Organisation	33
1.2.3 Anchoring Bid and Proposal Management within a Company	35
1.2.4 Decentralised Organisation, Central Management	39
1.2.5 Offshoring or Nearshoring	40
1.2.6 Using External Consultants or ‘On-Demand’ Proposal Managers	41
2 Crucial: A Well-Trained Proposal Team	45
2.1 Training for Proposal Managers	46
2.1.1 The Requirements of a Proposal Manager: A Superhero	46
2.1.2 Key Training Topics for Proposal Managers	47
2.1.3 A Track Record for Proposal Managers: APMP Certification	48
2.2 Training for Other Team Members	50
3 A Tailored Process	51
3.1 More Than Just a Process of Internal Approval	52
3.2 Professional Integration into the Company’s Process Landscape	58

4	Competition Culture _____	60
5	The Right Tools _____	61
<b>Part II: Systematically Understanding the Customer’s Perspective _____</b>		<b>63</b>
1	From Need to Contract: The Long Decision-Making Process _____	67
1.1	It Always Begins with a Need.....	68
1.2	From Need to Want: The Desire for Change Awakens.....	73
1.3	From Want to Demand: Things Get Serious.....	74
1.4	Finally: The Purchase Decision.....	76
2	The Buying Centre: The People behind the Purchase Decision _____	78
2.1	The User .....	80
2.2	The Subject Matter Expert (Technical Buyer) .....	81
2.3	Management (Economic Buyer, Approver) .....	82
2.4	Procurement (Purchasing, Sourcing) .....	83
2.5	The Great Unknown: External Consultants .....	85
2.6	Additional Roles .....	86
3	How Customers Evaluate Your Bids _____	87
3.1	The Tender Evaluation Process: Different Every Time .....	90
3.2	Central Mechanisms: Spreadsheets, Criteria and Points .....	93
3.3	The Customer’s Evaluation Goggles.....	96
3.3.1	Foundations: Easy Readability .....	99
3.3.2	Go the Extra Mile: Compliance and Responsiveness.....	100
<b>Part III: The BidMaster Framework _____</b>		<b>103</b>
1	Bid Preparation: Before the Request for Proposal (or Tender) Is Received _____	109
1.1	Save Valuable Time with Preparatory Work .....	110
1.2	The Four Typical Areas for Preparatory Work .....	112
2	The RFP Has Been Received: Let’s Go! _____	114
3	RFP/Request Analysis _____	116
3.1	Make Your Core Team Responsible for the Analysis! .....	118
3.2	The Dynamic Dozen: Analyse the Twelve Key Components! .....	119
3.3	Get Answers to Your Questions and Use the Question Rounds.....	126
4	Bid Qualification or the Bid/No-Bid Decision _____	128
4.1	Use the Six Magic Questions .....	134
4.2	Qualification Is a Management Task: The Opportunity Board .....	136
4.3	If You Say No, Say It Properly! .....	139

5	Proposal Strategy and Bid Set-Up	141
5.1	Your Team Set-Up: Get Your Whole Bid Team Together	143
5.2	Define the Optimal Document Structure	144
5.3	Proposal Planning: Plan Your Proposal Process Working Back from the Due Date!	151
5.4	Define the Target Price	159
5.5	Develop the Four Pillars of Your Proposal Strategy!	163
5.6	Draft Your Storyline	169
5.7	Define the Structure of Your Business Case	170
5.8	Draft the Executive Summary	172
5.9	Set up Joint File Storage for the Team	172
5.10	Thoroughly Prepare for the Kick-Off Meeting	174
6	Solution Design	178
7	Finalising the Storyline and Document Draft	180
8	Calculating Costs and Risks	181
9	Writing and Editing Iterations (Text and Graphics)	184
9.1	Draft Images <i>before</i> the Text!	185
9.2	Observe the Seven Golden Style Guidelines When Writing Your Text!	186
9.3	Have All Documents Systematically Proofread or Edited!	186
9.4	Observe Correct (Micro) Typography	188
9.4.1	The Most Important Typography Rules for Proposal Writers	188
9.4.2	Different Strokes for Different Folks	195
9.5	Use a Professional Document Template	196
9.5.1	Text	197
9.5.2	Page Design (Layout)	200
9.6	Plan, Manage and Review Any Translations Thoroughly	205
10	Finalising the Business Case	206
11	The Red Team Review (Final Document Review, Document Readiness Review)	211
12	Business Case Approval	214
13	Finalising the Proposal Document (Printing, Binding, Hole Punching, Folders, Creating PDFs, Packaging etc.)	216
13.1	Final Formatting and Digital Production	219
13.2	Physical Production	223
14	Submitting the Proposal	230
15	Post-Submission	235
15.1	Get Ready for Subsequent Requests and Clarifications	236
15.2	Use the Proposal Presentation to Build Trust	236
15.3	Don't Let the BAFO Put Too Much Pressure on You!	242
15.4	Negotiate Smart, Not Hard!	243

16	Maintaining Customer Relationship and Lobbying during the Proposal Process _____	248
17	Partner Management (Teaming) _____	251
18	Logistics _____	255
19	Efficient Management of the Proposal Process _____	256
20	Lessons Learned: Improve Systematically _____	260
21	Party Time! _____	263
<b>Part IV: Developing a Convincing Story (Storyline Method) _____</b>		<b>265</b>
1	The Customer and Needs Analysis _____	268
2	Developing Key Messages _____	269
3	Setting up a Message Tree _____	280
4	Developing Compelling Proposal Content _____	289
4.1	Create Images BEFORE Text .....	289
4.2	Ground Rules for Text Development: Two Principles, Seven Golden Style Guidelines and a Couple of Tricks .....	306
4.2.1	Principle 1: Use the Customer’s Language from the Beginning! .....	306
4.2.2	Principle 2: Focus on the Benefit .....	307
4.2.3	Seven Golden Style Guidelines .....	307
4.2.4	Stay Positive! .....	312
4.2.5	Ghosting .....	313
4.2.6	Repeat Your Messages: Little Strokes Fell Big Oaks .....	315
<b>Part V: Typical Elements of a Proposal Document _____</b>		<b>317</b>
1	Cover Letter (Side Letter) _____	319
2	The Executive Summary _____	321
3	The Customer’s Business Drivers, Aims and Challenges: We Understand! _____	329
4	Solution Description (‘Our Offer’) _____	331
5	Experience and Skills _____	334
6	Commercial Information _____	336
7	About the Bidder _____	339
8	Next Steps _____	341
9	Attachments _____	342
9.1	References .....	344
9.2	CVs .....	345
9.3	Indexes .....	348

<b>Part VI: Tender Types and Consequences for Proposal Management</b>	<b>351</b>
1 The Beauty Contest	353
2 Q&A-Style Requests	354
3 Unsolicited Proposals	356
4 Public Tenders	357
5 Grant Writing	359
6 Licence Applications	360
<b>Part VII: This and That</b>	<b>361</b>
1 Local Differences	363
2 Industry Differences	365
3 Risk Management	367
4 Proposal Management Controlling	371
5 The APMP (Association of Proposal Management Professionals)	375
6 Bidding for Small and Medium-Sized Enterprises	377
7 Knowledge Management and Acquiring Information	378
8 Bidding under Time Pressure	380
9 Pre-Written Texts (Boilerplate)	383
10 Sizzle	384

<b>Appendix</b>	<b>387</b>
<b>Appendix A: Glossary</b>	<b>389</b>
<b>Appendix B: The APMP Certification Programme</b>	<b>415</b>
1    APMP Certification: Certification in Three Steps .....	415
2    What Are the Benefits of APMP Certification? .....	416
2.1    For Certificate Holders .....	416
2.2    For Companies and Organisations .....	416
3    What Is Tested and How? .....	417
4    What Are the Prerequisites for Certification? .....	420
5    What Does APMP Certification Cost? .....	421
6    What If a Candidate Doesn't Pass the Test? .....	422
7    How Much Time Is Needed for Preparation? .....	423
8    For How Long Does Certification Apply? .....	424
<b>Appendix C: Literature Recommendations</b>	<b>425</b>
<b>Appendix D: Sample Documents</b>	<b>429</b>
D.1    Sample Side Letter .....	430
D.2    Sample Cover Page .....	431
D.3    Sample Executive Summary .....	432
D.4    Sample Rejection Letter (No-Bid) .....	435
D.5    Sample Request to Postpone Submission Deadline .....	436
D.6    Sample Risk Assessment .....	437
<b>Appendix E: Checklists</b>	<b>439</b>
E.1    RFP/Request Analysis Checklist (The Divine Dozen) .....	440
E.2    Qualification Checklist (Six Magic Questions) .....	441
E.3    Kick-Off Preparations Checklist .....	442
E.4    Proposal Planning Checklist .....	443
E.5    Document Finalisation Checklist .....	444
E.6    Production Checklist .....	445
E.7    'Pre-Submission' Checklist .....	446
E.8    The Seven Golden Style Guidelines .....	447
<b>Appendix F: Online Tools and Other Links</b>	<b>448</b>
<b>Index of Terms</b>	<b>451</b>
<b>Thank you!</b>	<b>459</b>
<b>About the Author</b>	<b>461</b>