Title: Successful Bid Writing

With: Alison Reeves – The Bid Writer

Agenda

Part 1 – What is the bid process

Part 2 – Writing persuasive content

Part 3 – Bid management planning

Part 4 – Making it work for you and your organisation

Welcome and Introductions

What is your current involvement in bidding?

What would you like to take from this session?

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What is the bid process?

What is a tender?

- An offer accepted on the buyer's terms. Creates a legally binding contract.
- Bound by the Public Contract Regulations and the need for transparency, openness and non-discrimination.
- Different types of procedure: Open Tender, Restricted Tender, Dynamic Purchasing System, Competitive Dialogue, Framework Agreement.
- Need to comply with all relevant legislation, along with the buyer's own policies, procedures and aspirations.
- Scored objectively using published criteria. No opportunity to negotiate after the fact.

UK Public Sector procurement spend in 2021/22

£379 Billion

£38 Billion SMEs

What is a tender?

Open Tender
All companies can bid. Often a qualification stage and tender stage in one process

Restricted Tender
Two-stage process. Qualification stage to shortlist bidders who are then invited to ITT

Framework Agreement
No promise of work. A number of shortlisted suppliers that buyers can use to deliver contracts

Dynamic Purchasing System
Similar to a framework agreement. But bidders can apply to join during the DPS duration

Competitive Dialogue
Used for complex bids. Bidders and buyers work together to explore solutions. Bidders then submit a best and final offer

Bidding for the right projects

The best way to win more bids is to only bid for opportunities you have a strong chance of winning

When finding bids to submit, the things to avoid are:

- **Having a "punt"** – bidding is not a numbers game. Submitting bids is costly. Focus your resources on prime opportunities
- **Last minute regret** – don't rush a bid response just to see how it goes, make sure you can put your best into the process
- **Unsuitable opportunities** – check that you can fulfil the requirements and the criteria *in full*
- **Chasing work** – don't bid low just to win a contract. You will still have to deliver it

What to consider: The bid/no bid decision

Basic Compliance – Do we meet all the criteria?

Track record and experience – Can we show we have done this before?

Capability – Including professional skills and geographic reach

Buyer's risk – How risky is it to choose us?

Deliverability – Can we deliver it profitably?

Competitors and fit – Who are we up against? How good a fit are we to the buyer?

Understanding the buyer’s needs

Supply Complexity

Leverage	**Strategic**
• Exploit buying power. Cost, availability and convenience are key themes • Assumes abundant supply	• Scarce or complex items • Develop relationships and collaborate to meet outcomes • High risk for buyer – will look for safe and capable suppliers
Routine • Abundant supply of low risk items • Cost, efficiency, ordering and service are key themes	**Bottleneck** • Scarcity of items – causes a bottleneck in service/production • Innovation, supply security, contingency and innovation are key themes

Supply Risk

This is called the Kraljic Matrix

Exercise 1: where are you in the matrix?

Using the Kraljic Matrix, identify where your different goods and services are in the matrix. How does this position affect the way you sell your organisation?

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Bid/no bid process

Before committing to a bid, take some time to:

- **Read** all the tender documents and highlight the key elements of the specification (shall/will/must)
- **Review** the evaluation criteria. Highlight and check any pass/fail requirements
- **Ask** any clarification questions needed to refine your understanding of the scope or the pass/fail criteria
- **Review** the contract budget and pricing schedule. Check if it is realistic and deliverable
- **Complete** a bid/no bid assessment to determine your position and proposal risk
- **Be** realistic about your position

Bid/no bid matrix

Compliance and Resources	
Do we comply with all the requirements? If we comply partially, can we mitigate this?	
Do we have the resources to complete the bid thoroughly?	
Deliverability	
Is this a core service for us? If not, can we recruit or subcontract the required staff?	
Do we have a presence in the local area?	
Do we have the resources and infrastructure to deliver from day one?	
Are we the incumbent? Do we have a relationship or knowledge of the buying organisation?	
Do we have a strong track record on similar projects that we can demonstrate?	
Do we have any unique or innovative approaches that we can bring?	
TOTAL	

Strong known advantage	5
Neutral advantage	3
No advantage/weakness	1
Unknown	0

Who's marking your bid?

Panel Member	Priorities and Needs
Procurement	Compliance, value for money, risk, suitability, budgets
Finance	Value for money, financial risk
Commissioner or Project Lead	Quality, deliverability, ease of working, legacy and aspirations
Technical Lead	Compliance with the specification, usability, quality
End-user	Supplier culture and commitment, ethics, responsiveness and understanding of end user needs
External expert	Verify quality, compliance and suitability of solution

All bids are assessed by an evaluation panel, usually 3-6 people. Each member will have a different priority

Buyer pain points: where to start

What's their issue? What makes them uncomfortable

What happens if things stay the same?

What job do they need to do? How do they need to perform?

What is their vision? What do they want to achieve?

What do they stand to lose if things go wrong?

What rules are they bound by?

Specifications: stated and unstated needs

The specification is the measure by which your bid will be assessed

- **Review** the specification line by line and highlight the shall/will/must statements
- **Note** if you comply with the requirement and if you have any added value you can bring to the specified requirement
- **Identify and validate** what the hidden needs and desires are behind the specification. Showing how your solution meets these needs will make your response persuasive and show that you understand the buyer's world
- **Note** any policies or legislation mentioned in the specification. The buyer will be looking for you to reference and comply with these
- **Clarify** any terms you are not sure about. The interpretation of a single word can make all the difference. It also helps the buyer to get what they want

"You don't buy a quarter-inch drill. You buy a quarter-inch hole"

Zig Ziglar

Getting tender ready

This ensures you have everything to hand before you start bidding

- Company information
- Certifications / accreditation
- Financial information
- Policies
- Processes
- Quality
- About your business

Exercise 2: reviewing a specification

Review the specification document. Highlight the key needs for the customer. What needs and desires could lie behind these?

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Writing persuasive content

Biggest mistakes when bid writing

1. Not signposting the evaluator to the key parts of the responses.
2. Using generic text with no reference to the customer and their needs.
3. Not using the word count allocation, or going over the stated limit.
4. Not answering all parts of the question.
5. Not providing evidence and examples.
6. Using cliches and low-value phrases.
7. Not answering the "so what?" question.
8. Burying the key information and making the evaluator look for it.

Evaluation criteria: the key to scoring well

Score	Classification	Definition
0	Unacceptable	No response, or totally unacceptable and does not meet the requirement in any way.
1	Inadequate	Substantially inadequate and does not meet the Councils' expectations in some significant areas. Response lacks detail and/or is inconsistent. No examples or evidence provided
2	Weak	Weak response that does not fully meet the Councils' requirements in many areas. Response may lack detail or little evidence given to support or demonstrate sufficiency or compliance.
3	Satisfactory	Response largely meets the requirements and evidence is given to support the answers. There may be one or two minor omissions but overall able to demonstrate sufficiency.
4	Good	Good response where all the requirements are met and evidence is provided to support the answers demonstrating sufficiency and compliance.
5	Excellent	Exceptional response that inspires confidence, specification is fully met and is robustly and clearly demonstrated. Full evidence as to how the service will be achieved is provided. The response offers innovative solutions and demonstrates a desire for continuous improvement.

Evaluation criteria: the key to scoring well

4	Good	Good response where all the requirements are met and evidence is provided to support the answers demonstrating sufficiency and compliance.
5	Excellent	Exceptional response that inspires confidence, specification is fully met and is robustly and clearly demonstrated. Full evidence as to how the service will be achieved is provided. The response offers innovative solutions and demonstrates a desire for continuous improvement.

Answer planning process: example question

Including evidence-based examples, please detail how you have communicated effectively with residents about domestic heating works, before, during and after works and how you minimised disruption to residents while on site. As part of your response, please detail how you ensured high levels of customer satisfaction were achieved and maintained.

Page limit: 2 sides A4.

Answer planning process

Part of Question	Customer Needs (stated and unstated)	What information is needed?	What evidence is needed?
Including evidence-based examples	Proof and assurance of successful delivery	Demonstrate a system for monitoring evidence	Metrics, accreditations
Detail how you have communicated effectively with residents about domestic heating works	Customer care, good communication, resident satisfaction, recognition of the difference of domestic heating works to other types of work	Process for customer communication. Policies and procedures	Customer satisfaction rates, no-access rates
Before, during and after works	Communication throughout the process, avoiding missed appointments	Process for before, during and after	Examples of before, during and after communication
Minimised disruption to residents while on site	Customer care and satisfaction, no complaints	Process for minimising disruption and risks	Examples of process. Customer testimonial
Ensured high levels of customer satisfaction were achieved and maintained	Consistent levels of quality and satisfaction	Methods for monitoring and improving customer satisfaction. Innovation around working with customers	Customer satisfaction metrics over time showing a consistent level. Third party audits.

Headings – engage your reader

Good headlines fulfil the following tasks:

- Signpost the reader to the different sections of the answer.
- Enable different evaluators to find the information they want to see.
- Show that you have provided the information in the right order.
- Create rapport by mirroring back the customer’s needs.
- Create interest by showing relevant benefits and outcomes.

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NEWS

Man stopped by police found to have been driving without licence for 72 years

He said he started driving when he was 12

3:43 PM · Jan 28, 2022

Good headlines are informative (not static) and create interest by engaging the reader with the benefits and outcomes you will deliver

Part of Question	Suggested headlines	Space assigned (2 pages total)
Including evidence-based examples	Not needed, subordinate to the main question	N/A
Detail how you have communicated effectively with residents about domestic heating works	• Communicating effectively through good resident liaison • Ensuring high levels of first time access through good communication with residents	1/3rd page
Before, during and after works	• Ensuring residents are aware of their appointment: before works process • Supporting residents in their home: during works process • Ensuring satisfaction when we leave: handover process	¾ page
Minimised disruption to residents while on site	• Respecting the resident's home through non-disruptive working • Achieving high levels of satisfaction by meeting resident needs • Working in a safe and harmonious way in resident homes	½ page
Ensured high levels of customer satisfaction were achieved and maintained	• Maintaining high levels of customer satisfaction • Exceeding KPIs for customer satisfaction: contract examples	½ page

Exercise 3: answer planning

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Using evidence based examples, please set out how you have ensured work is completed to a high standard at all times and your process for monitoring both servicing and repair/maintenance works. As part of your response, please detail how you ensured high access rates were maintained

Page limit: 2 sides A4.

Part of question	Customer needs	What information is needed?	What evidence is needed?	Suggested headlines	Space allocated

Writing compelling body text – key techniques

Bid writing is best described as a combination of technical writing and copywriting. The purpose is to sell, but in a way that is backed up with evidence and detail.

- **Focus on the customer** – prioritise the information that the customer wants to see. Don't write at length about your organisation or about irrelevant topics. Always ask yourself "what's in it for the customer?"
- **Grab the reader's attention** – start paragraphs and sentences with customer focused statements. Don't bury your key selling points
- **Spell out the benefits** of your solution. Don't leave it to chance that the reader will understand what makes you different
- **Use tables, bullet lists and graphics and pull quotes** to highlight key information and make the document easier to scan (if permitted by the formatting rules)
- **Use the customer's language** and mirror back their name, terms and language. For example, residents instead of tenants or clients

Writing compelling body text – key techniques

Compelling body text contains the following types of information

- **Customer benefits** – the positive value they receive from your offer. Answers the "so what" question. Benefits can be transactional or aspirational
- **Customer outcomes** – links the benefit statement to the customers needs. Shows why it is important to them. Link to rules and regulations in the public sector
- **Methods** – how you will implement the solution. Best explained through a logical pattern using the 5Ws structure
- **Evidence** – of where you have successfully delivered similar work before. Third party evidence is the strongest (testimonials, external audits, KPIs)
- **Credibility builders** – your "defence" as a bidder. Can include accreditations, case studies, previous relationship with the customers, local presence, innovation and social value

Customer benefits and value propositions

	Short Term	Long Term
Aspirational	**Recalibration**	**Transformation**
Operational	**Problem Solving**	**Continuous Improvement**

Customer benefits and value propositions

Weave benefit statements through your bid like a well made basket. Move through the different boxes depending on the context of the question (and the Kraljic Matrix).

- You will receive (benefit) as a result of (solution) which we will implement by:
- Our solution has (feature) which means you get (benefit)
- As proven on (project) you will get the (benefit) due to our (feature)
- We will achieve (benefit) through (solution)
- This (benefit) means you will get the (outcome)

Editing tips for power and punch

- **Prefer the active voice:** *We will implement the project* rather than *the project will be implemented by us*
- **Avoid nominalisations:** The project will carry out analysis, monitoring and review of the proposed activities. Instead, try “The project will analyse, monitor and review the proposed activities”
- **Avoid too many long sentences:** An average of 15-20 words is good to aim for across the document
- **Involve others** and ask them to review the draft to ensure it makes sense
- **Check** that the terminology is correct
- **Remove** needless words and sentences. This ~~also~~ frees up space in ~~often~~ tight word counts
- **Review** against the award criteria and answer plans. Are the responses complete and are the key points clear?
- **Ask** if the responses pass the 3pm on Friday test

> “To write is human, to edit is divine.”
>
> -Stephen King

Exercise 4 – Improve this bid response

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Review the example answer. Using what we have discussed so far, what are the weaknesses and areas for improvement? How convinced are you by the response?

Think of all aspects of how to answer a question, including answer planning, layout, style and relevance

3

Bid management planning

Introduction to bid management

The purpose of bid management is to avoid

- Last-minute rushes and sleepless nights
- Going back to the drawing board
- Delays in critical information
- Difficulties with colleagues

Bid management planning

- **Read** all the documents and list every piece of information requested
- **Assign** a responsible person for each piece of information
- **Use** a RAG rating to prioritise the information needed. Get “hard to find” information early
- **Give** an internal deadline to have a draft of each response or document needed. Work backwards from the deadline and schedule enough time
- **Update** the plan to monitor progress and flag anything at risk of delay
- **Share** the plan with colleagues regularly to manage engagement and input
- **Identify** times when the subject matter experts are unavailable, such as planned holidays or unavoidable work commitments

Bid management planning

Question or document Reference	Requirement	RAG Rating	Person responsible	Deadline	Status
SQ – Finance Question 1.1	3 years' audited accounts	Green	Finance	20/09/2020	100% documents received
Technical Questions 1.1 Method Statement	1,000 word statement on the technical solution	Red – new information needed	Operations	15/09/2019	25% operations briefed, awaiting information

Using a percentage status helps to keep track of progress. 25% information requested. 50% draft in progress. 75% draft complete. 100% draft reviewed and signed off

Bid risk management

Staff resources for both the bid and the service

Solution availability and deliverability

Opportunity cost

Operational risks

Production and submission

Sign-off

Process management risks

Bid kickoff meeting

Holding a kickoff meeting is advisable, even if the tender is small. The objectives of the meeting are to:

- **Gather the key staff members** and inform them of the bid, its importance and what information or support you need from them
- **Get support** for the bid project through an executive sponsor and business case
- **Review the specification and scope** to identify the solution and develop your selling points and value propositions
- **Flag** the critical information needed and ask the right subject matter experts to source the information on time
- **Agree** the deadlines for drafts and final review and ensure everyone with authority has the opportunity to review the bid content and sign off on commercials and solutions
- **Discuss** any unclear areas and identify any clarification questions needed

Managing stakeholders

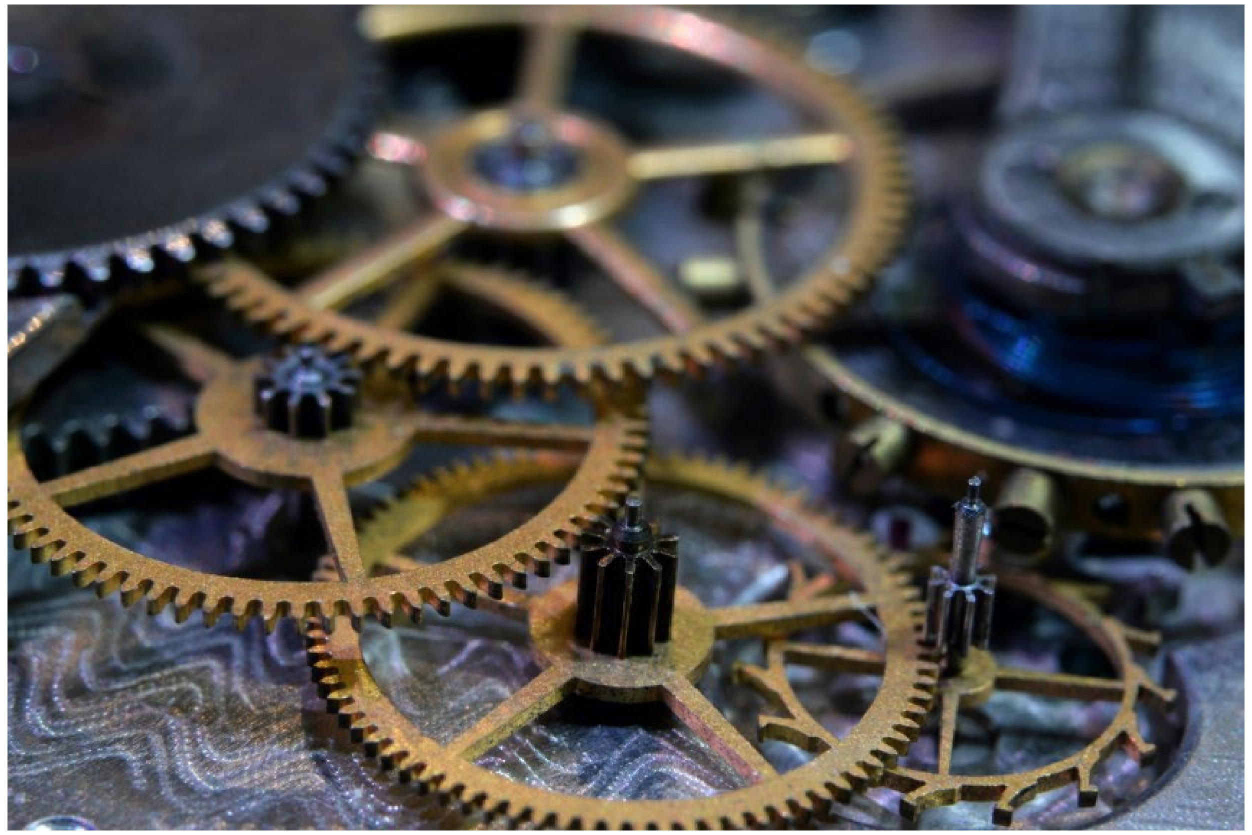
Bid managers and writers need to strike a balance between maintaining relationships with stakeholders while keeping the process moving and ensuring the bid is as good as possible for the organisation.

- **Emphasise** the importance of the bid to the organisation and show how important it is to submit the best response possible
- **Maintain** a communication plan for all key stakeholders with clear lines of responsibility and accountability. Especially for remote or virtual teams
- **Make life easy** for contributors by providing an answer plan and specific guidance on the information you need
- **Use the "evaluator's hat"** exercise to challenge stakeholders in a constructive way
- **Consider different working styles** and tailor your approach accordingly
- **Use a common platform** for communication and document sharing with all contributors

Other useful pre-bid tasks

Bids have lots of moving parts. Surprises can spring up from anywhere. The following preparation can save hassle during the process

- **Test** the tender portal thoroughly. Check for hidden character counts, hidden document uploads and mandatory boxes embedded in the forms
- **Prepare** the required formatting. Engage with graphic designers early in the process
- **Check** the pricing schedule for errors or discrepancies. Ask a clarification question to resolve early
- **Clarify** roles and responsibilities, especially who needs to approve content before submission
- **Establish** processes for sharing documents and managing versions. Have backup plans to mitigate ICT issues



Ongoing bid management

Bid management is a daily task throughout the process. Things can change quickly, so taking 10-15 minutes to update the tracker can save a lot of time and work later on.

Daily Tasks

- Check the tender portal for clarification questions or changes
- Check and update the bid management plan to show live progress
- Flag any information at risk of being late to the SMEs
- Manage risks affecting progress. For example, unplanned staff absence

Less-frequent tasks

- Weekly review meeting or call to get updates from subject matter experts
- Update key stakeholders and senior decision makers
- Check in with subcontractors or partners
- Update graphic designers and others involved in the submission process

The importance of clarification questions

Clarification questions are an opportunity for both the bidder and the buyer to test their understanding of the specification and scoring. If in doubt, ask a clarification question, it may save a lot of time and energy

- **Remove ambiguities** by asking clarifications. Specifications are written from the buyer's perspective, there may be areas that others find unclear
- **Ask critical bid/no bid questions early.** These can relate to minimum criteria, experience, or understanding of the project's scope and deliverability
- **Clarify any commercial concerns.** Don't leave the pricing to chance, especially if it can be exploited by your competitors or result in uncompetitive pricing
- **Check the scoring.** Make sure you understand what you need to provide to score top marks. If the question or the criteria are unclear, ask for clarification
- **Don't be afraid to ask.** You are not "rocking the boat". An error can result in the buyer having to cancel and rerun the whole process. If in doubt, set up a neutral account on the tender portal separate from your company log on

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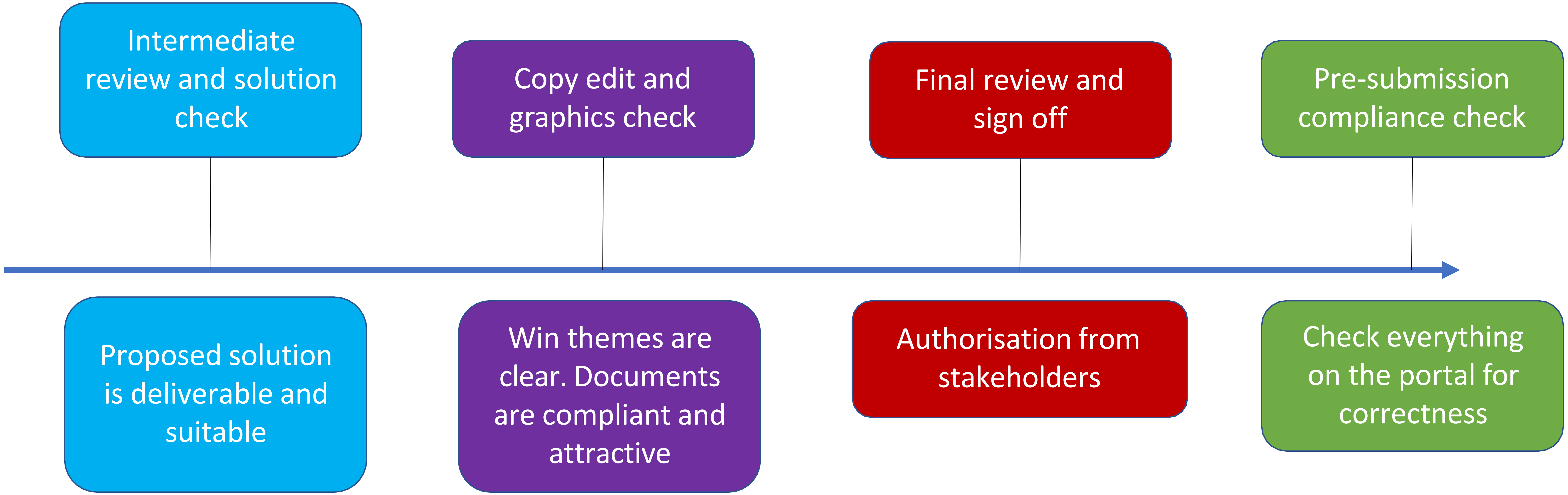
Bid review management

The number and type of reviews depends on the complexity of the bid and the number of people involved.



Exercise 5 - Bid management

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In the breakout rooms, discuss and compare your current approach to bid management. What works well and what does not work well? Make some notes here about what you plan to change because of this course.

4

Making it work for you and your organisation

Developing a long-term approach to bidding

Successful organisations harness their whole team and make bidding a key part of their development strategy.

- Always ask for feedback and use it to improve
- Embed a culture of bidding in your team
- Capture planning: thinking ahead to win more bids
- Analyse bid metrics

Using feedback effectively

- **Always ask for feedback** – Public bodies must give feedback on your scores and how they compare to the strongest bidder. This must include the strengths and weaknesses of your response
- **Be persistent** – you are entitled to feedback. Don't be afraid to request a debrief meeting with the buyer to review your response
- **Have a process** to analyse feedback and make improvements
- **Look for trends** in strengths or weaknesses and the root causes of these. This will help you identify which parts of the bid process can be improved
- **Share feedback** with your team to get ideas for how to improve in specific areas

Embedding a culture of bidding in your team

Involve team members in the bid process

Everything is useful in bids – no matter how routine

Collect case studies, testimonials and evidence

Gather metrics and performance data from across the organisation

Help prepare for future opportunities

Use staff feedback to improve your USPs

An effective format for case studies

Information presented as a story is up to 22 times more memorable than facts alone. Engage the reader by presenting your case studies as a business story.

Summary

- Write last
- Short summary to use in answers.
- Customer/client name, problem, solution, benefit.
- One or two paragraphs at most.
- Teaser for the rest of the case study

Act 1

- Introduce the client and the problem or opportunity
- Highlight the stakes
- Show why you and your solution was chosen

Act 2

- Detail what you did, focusing on how you overcame the problem
- Use the 5Ws format
- Include evidence, details and quotes

Act 3

- Show the positive results you achieved
- Show the long-term benefits for the customer

Don't forget to write a catchy headline which focuses on the benefit received or the pain avoided

Capture planning

Capture planning is the process of preparing to win tenders 6 to 12 months in advance of the documents being published.

- **Note** the likely date when the next tender should be due. Pop this in your diary with a reminder in good time to prepare.
- **Research** the customer organisation to identify their needs. Look for any aspirational or transformational goals you can prepare a solution for
- **Examine** the likely competition. Get an idea of how the incumbent provider is performing and how you can exploit any weaknesses
- **Invest in** any accreditations or qualifications or systems that will support your application
- **Prepare your evidence** ahead of time to help make the bid writing process easier
- **Engage with partners** early to help coordinate the bid submission process and prevent delays during the response period
- **Plan for and mitigate** risks like availability of staff for bid production, pricing and sign off

Analyse bid metrics

Metrics provide a clear view of how you are performing and where to improve.

Type of Metric	Use
Win rate (number won/number bid for)	Can provide a temperature check, but has limitations as a success measure
Average price or quality score	Can help identify recurring trends of what works well and what doesn't
Total contract value won or retained	A key measure likely to be tied to sales targets and company objectives
Social Value measures (number of jobs created, Apprentices, community impact)	Key measures to record in public sector bidding to evidence social impact

Summary and Close

Summary: 10 tips for winning

1. Qualify every opportunity and only bid for those you have a strong chance of winning
2. Review all the documents in detail and pick out the buyer's stated and unstated needs
3. Use the clarification process to aid your understanding of what the buyer wants
4. Plan each answer and follow the structure and wording given in the question
5. Weave benefit statements into your responses to answer the "so what" question
6. Use a bid management plan to keep track of all output
7. Involve your team in the bid process and communicate regularly
8. Get feedback on every bid, win or lose, and use it to improve
9. Harvest case studies, best practice and testimonials from your staff
10. Think ahead to upcoming bids and plan strategically to improve your chances


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