



20  
YEARS,

20  
LESSONS

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“Proposals 2020” was a flagship event run by Strategic Proposals on 4th February 2020. The event took place in the Great Room at the Royal Society of Arts in London, attended by around 100 directors / heads of bid and proposal management.

This paper shares the script of the feature presentation that was given on the afternoon of the event by Jon Williams. SP’s UK managing director.



It's just over

20

years since I moved out of procurement into proposals, and so I'd like to take a little time this afternoon to share some personal perspectives. What are some of the key things I've observed and learned over a little more than two decades of working with proposal teams around the world?

Who's primarily a bid person?

Who's a proposal person?

Who's a bit of both?

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Do you know, one of the first and most important things I learned in this profession of closely intertwined disciplines is that bid management and proposal management are not the same thing.

I have huge admiration for the brilliant bid managers I meet and work with. The skills of managing the end to end campaign; identifying and on-boarding the right participants and partners to help win the deal; shaping the proposition, designing the overall client influencing plan up-front; steering the governance process; leading the team through negotiations to close the deal. It's brilliant stuff. It's not the same as what I do as a proposal leader: taking that team and helping them tell their story powerfully and persuasively in a brilliant proposal and pitch.

And you know what? Where I see teams and individuals struggle, it's too often because their roles are confused. There's too much to do; the art of developing a great proposal gets overlooked.

And as a result, a great bid process is let down.



## BID MANAGERS AREN'T GREAT WRITERS

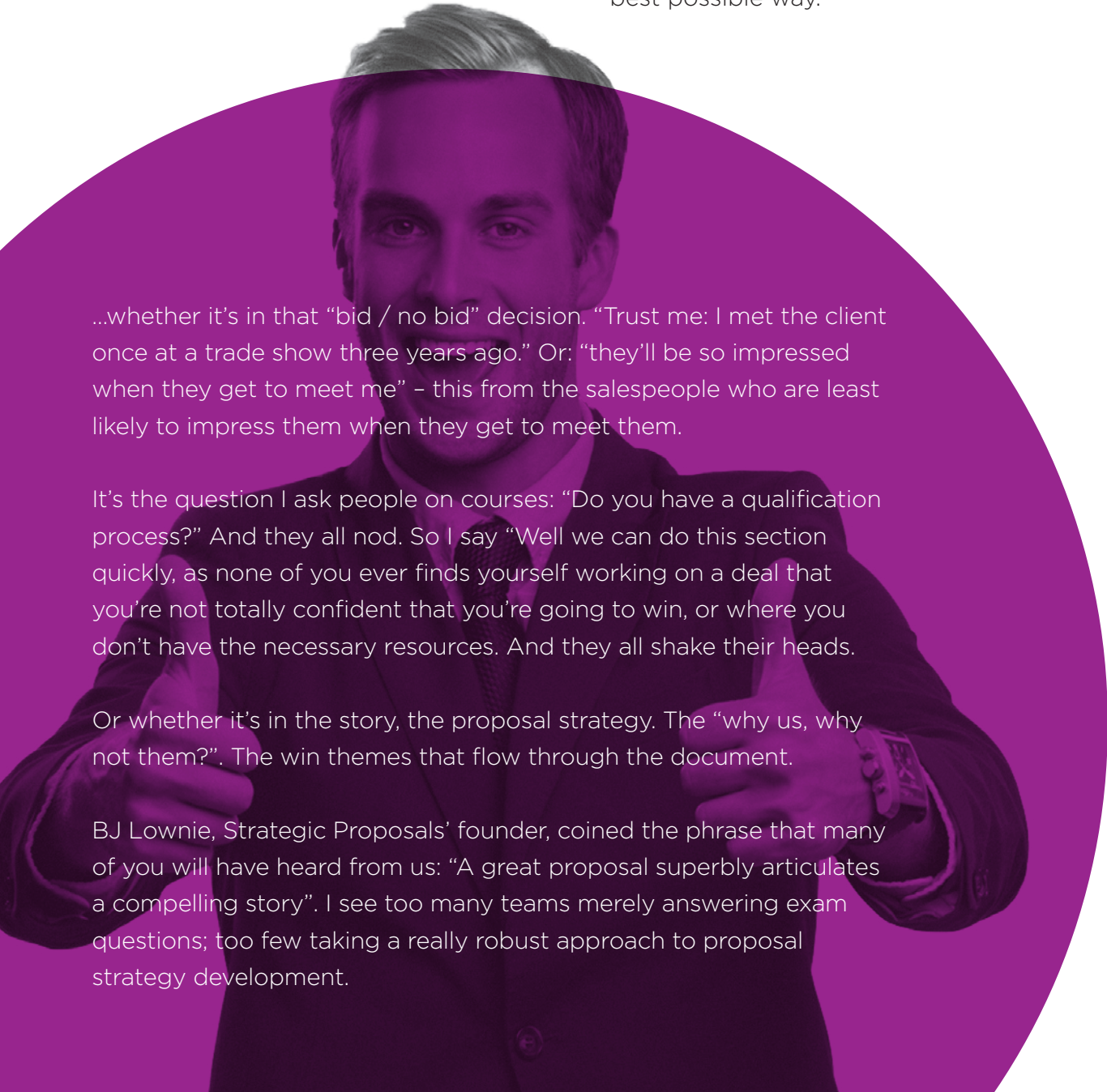
It's not just time: it's the skill set.

I've worked with brilliant proposal managers, skilled in the art of planning and running a great proposal effort. Gifted storytellers.

Wonderful writers and editors, who can make subject matter experts sound more eloquent than they thought they could be - the sort of people who sit editing the back of the cereal box at breakfast.

Amazing designers, able (and this is a rare skill) to execute at proposal speed.

The very best proposal people rarely make the very best bid managers - and the very best bid managers struggle to articulate the story in the best possible way.



...whether it's in that "bid / no bid" decision. "Trust me: I met the client once at a trade show three years ago." Or: "they'll be so impressed when they get to meet me" - this from the salespeople who are least likely to impress them when they get to meet them.

It's the question I ask people on courses: "Do you have a qualification process?" And they all nod. So I say "Well we can do this section quickly, as none of you ever finds yourself working on a deal that you're not totally confident that you're going to win, or where you don't have the necessary resources. And they all shake their heads.

Or whether it's in the story, the proposal strategy. The "why us, why not them?". The win themes that flow through the document.

BJ Lownie, Strategic Proposals' founder, coined the phrase that many of you will have heard from us: "A great proposal superbly articulates a compelling story". I see too many teams merely answering exam questions; too few taking a really robust approach to proposal strategy development.

# COMPETITIVE GUESSWORK



Who's competitive? Who has a really brilliant, robust process for managing competitive intelligence in your bid / proposal process?

That "why not them" is of course dependent on knowing who they are, and what they'll do.

It's when you ask the sales lead: "Who are we bidding against?" and they reply: "The usual suspects". I'm not asking for the name of your favourite movie of the '90s, my friend: I want to know who we're bidding against.

And that's before we even get into understanding their likely proposition, their story, their bid approach - and what we need to do to beat them.

Having spent a fair amount of time in the past couple of years with SCIP and researching this whole area of CI, I firmly believe that Bid & Proposal Competitive Intelligence will be one of the big next things for our profession as we roar into the twenties.



IF YOUR SALES  
PEOPLE LOVE YOU

...YOU'RE PROBABLY DOING  
SOMETHING WRONG

This hints, I think, at the nature of the relationship between salespeople and proposal people, inevitable perhaps from the way our profession has evolved.

We started, as a profession, with a remit to make life easy for sales. To move them away from “Has anyone written one of these lately?” and “buddies and favours” and make the process easier for them.

- To set up the meetings.
- To chase the contributors.
- To plug the document together and make it “complete and compliant”.
- To get it printed and know how to use the hole puncher or binding machine.

No magic. Often, a back-office factory. Often, overworked and undervalued.



And for me, great proposal leaders are challengers. Professional protagonists.

Of course, building rapport with sales colleagues and being loved for helping them win. But not being afraid to ask those difficult questions. Not being seen as glorified admin. Being trusted for being professionals.



# THERE'S ALWAYS ENOUGH



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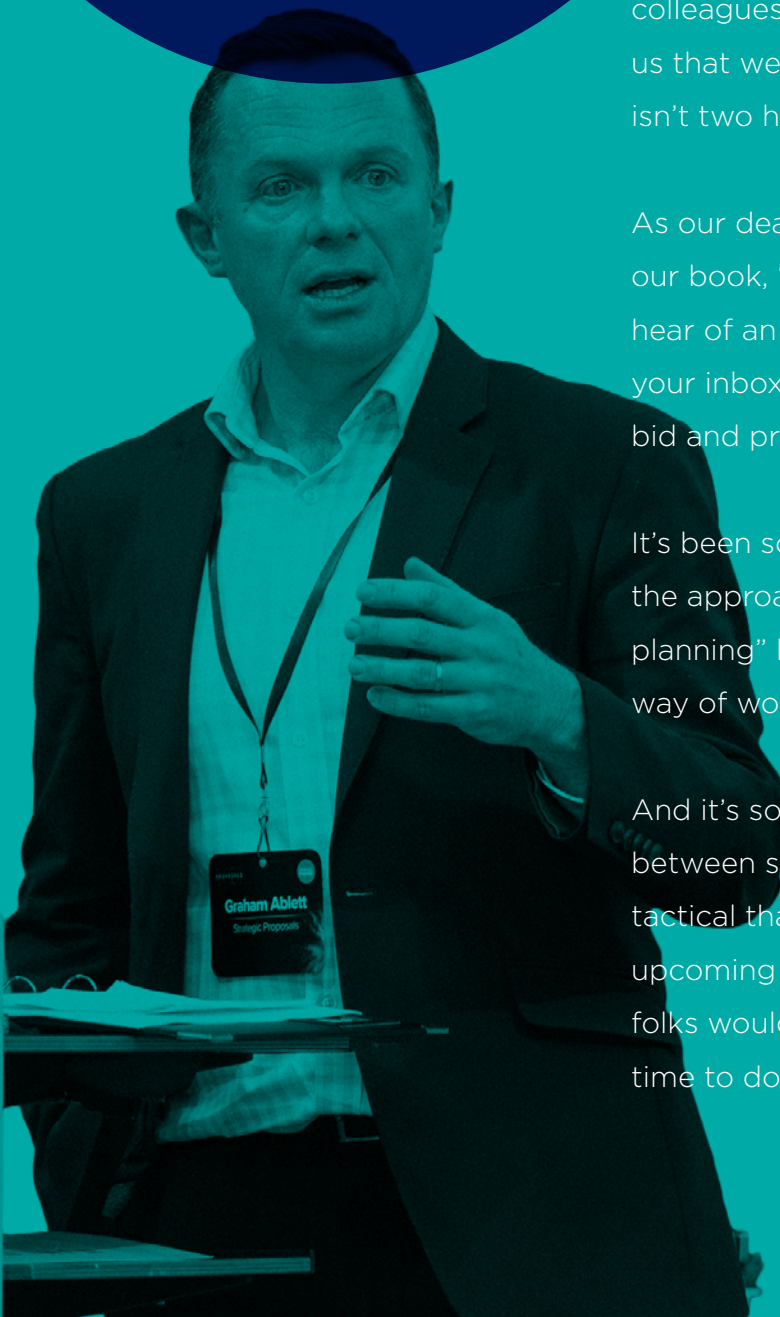
## ...IF YOU START SOON ENOUGH

Of course, that means challenging sales colleagues to understand that the time to tell us that we're going to need to write a proposal isn't two hours after the RFP's landed.

As our dear friend Jay Herther commented in our book, 'Proposal Essentials': "If the first you hear of an RFP is when it comes crashing into your inbox, you'd be better off spending your bid and proposal budget on lottery tickets".

It's been so satisfying over the years to see the approach we developed of "pre-proposal planning" become something of a standard way of working in so many firms.

And it's so depressing when the relationship between sales and the proposal team is still so tactical that sales wouldn't know to flag the upcoming deal in advance – and the proposal folks wouldn't know what to do, or have the time to do it, if they did.





# RENEWALS NOT

# RE-BIDS

And why are we waiting for RFPs anyway? I know that in some sectors, the competitive game is inevitable from time-to-time. But I sat in a presentation a few years ago at an APMP event up in York, where the speaker was waxing lyrical about “re-bids”.

And I commented at the time: in so many cases, if you let it get to a “re-bid”, you’ve already started to fail: you’re on a slippery slope you don’t want to be on.

Show of hands: how many of you could list your organisation’s top ten renewals that will fall in 2021? [Barely a handful of hands went up, from around 100 participants]

Keep your hands up if you’ve already submitted a renewal proposal or are already working on one? [Even fewer!] Mmmm: that says a lot.

And, of course, it’s not just about renewal proposals – if you’ve not heard or read my colleague Graham Ablett talking about proactive proposals, you really should.

# RECRUIT BRILLIANT PEOPLE

I have a view that there are four types of people in proposal organisations:

- Brilliant
- Really good
- Good - and can (and want to) be developed
- Go back to the office and get rid of them right now.

It's always been a fundamental tenet for me, whether in this wonderful job I have of leading the thirty people in the SP team here in the UK, or when I've built or optimising proposal centres for many of our clients, that success starts with recruiting the best possible people - and not being overly generous to those who simply don't get it.

Again, to quote BJ: there are only three types of people in the world:

“those who get it  
those who can be shown it...  
and those who ain't never going to get it”.



# PAY PEANUTS

Where's "Ben Hannon from Bid Solutions? Every two years these folks produce a brilliant, really comprehensive UK salary survey.

Who pays their proposal people significantly above the market average?

Actually, do you even know what the market average is for a proposal manager, a writer, a designer in the UK in 2020?

There may be a little geographic variation, of course. I'm not sure I'd buy that there needs be sector variation in the proposal profession, when our skills are so eminently transferable.

Come what may, the old adage on the screen holds true - or, at least:

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**"PAY PEANUTS AND SOONER OR LATER YOUR STARS WILL LEAVE".**

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# IF IT LOOKS AMATEURISH...

Back in 2008, SP organised the first 'award' in the proposal profession here in the UK - followed, perhaps thanks to our unsubtle hint, by APMP UK not long after.

The one we ran was for proposal design. We had lots of entries. By the standards of the day, some of them looked amazing.

By the standards of today, they don't: I happened to come across the folder with the submissions late last year, and trust me: "Your proposal looks very 2008" isn't a compliment.

Of course, at the proposal stage - if not the pitch - we're in a world where sometimes we're constrained by what our colleague Susan Hanning calls "passive aggressive formatting instructions". But people see what it looks like before they read what it says: so often, if your proposal looks amateurish, they'll think you are amateurish.

I guess the question to ask is: on your last bid, whose proposal looked more professional: yours, or your competitors'?

OMG

Visual

Clipboard



Over the last two years, what are the changes you've made that have had the biggest impact on your organisation's proposal capabilities?

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6

## THE EXPERIENCE IN THE ROOM

And while I mention the pitch, or proposal presentation, or bid presentation, or whatever you tend to call it. I'm so glad we've seen the death of death by PowerPoint.

But if you even think of the pitch as a group of clients sitting looking at a screen, I think in 2020 you're missing the point. It's not just a presentation: it's about crafting the right experience in the room for the clients, to build trust and rapport and credibility. And that's rarely about sitting looking at slides.

What are you doing to be differently better when you get face-to-face?



WHO'S  
KEEPING  
COUNT? 1

Talking of slides: I  
promised you 20+  
lessons. Anyone keeping  
count? We're half-way  
through!

# FRAMEWORKS OFTEN DON'T

Two statistics depressed me recently from some of the excellent stuff generated by Tussell, the research agency. First up, of the 4,000 or so companies on G-Cloud 10 - one of the government's major IT frameworks - 86% didn't earn any revenue whatsoever from the framework in 2018. Second: in the four years from 2015, there were 307 separate frameworks created by the UK public

sector for management consulting work. That's one framework for every 200,000 citizens, which seems like a lot of management consulting!

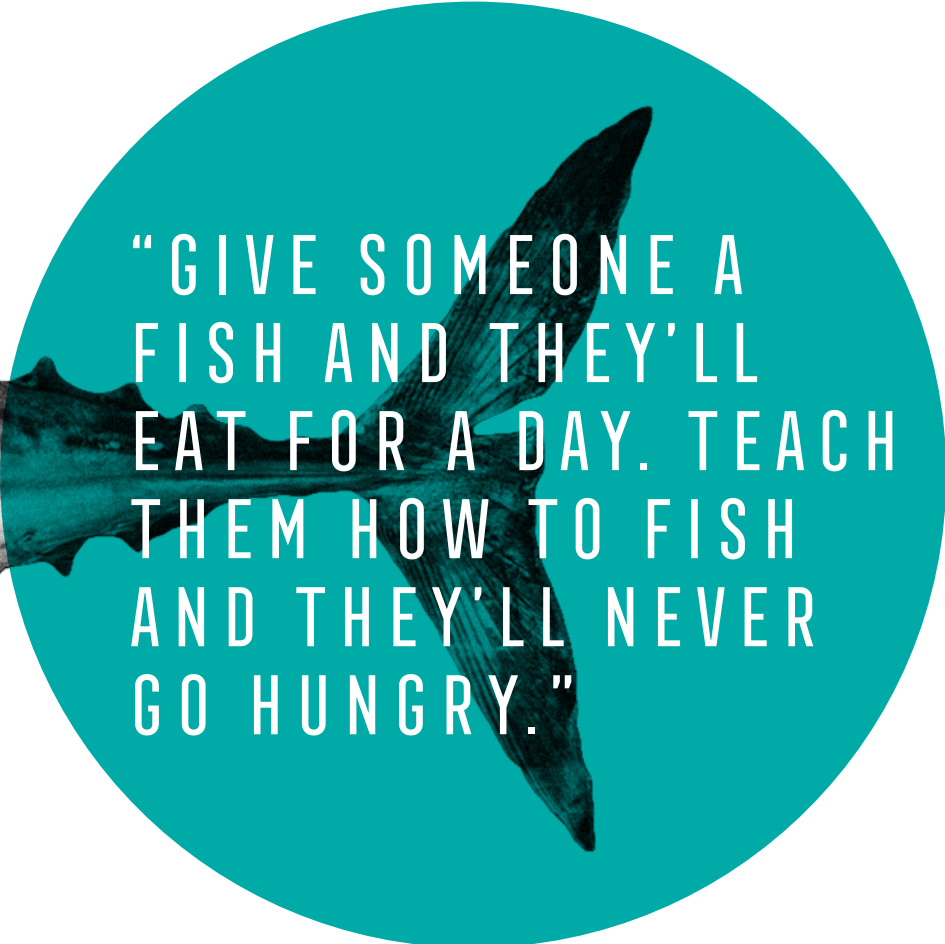
For too many organisations, getting onto the framework is seen as the success. And it is undoubtedly so: we're very proud of some of our 'wins' for clients of this nature in the past few months alone.

But the real secret of a framework is winning business from it. And in our experience, too few organisations bring enough focus to the proposals that will help them to do that.

This is going to be one of our research areas in 2020, and I'd love to chat if you're keen to participate.



**We all know the quote,  
don't we:**



**“GIVE SOMEONE A  
FISH AND THEY’LL  
EAT FOR A DAY. TEACH  
THEM HOW TO FISH  
AND THEY’LL NEVER  
GO HUNGRY.”**

For us in the room today, it's BJ's memorable adage: "All those involved in proposal development must be trained in the necessary skills". All. Proposals, bids, sales, subject matter experts, senior managers. All.

Regularly, keeping them fired up and at the peak of their game. "Oh, our centre forward? Doesn't come to the training ground. Scored a lot of goals in their career. Not so many this season, mind..."

To me, the single most important thing you can do as leaders to boost win rates is to create the right environment for continual learning to evangelise best practice, and support and push your people to develop ever-better proposals in ever-better ways.

By the way: I heard a different contemporary version of that old saying that other day, and it made me smile: "Give a man a fish and he'll eat for a day. Teach a man to fish and he'll never go hungry. Teach a woman to fish and the whole community will be well fed!"

And in passing, while we're talking about people development aspect of proposals: it's a source of great pride to us that APMP's new apprenticeship scheme launched last year, something came from the initiative of my colleague Amanda Nuttall, who designed the scheme, and Kat Wyon who steered it on its way for much of its journey.

# BUYER AWARE

I started my career in procurement before I crossed over from the dark side, and I still believe that that's what's made me successful in the proposal profession.

So, do your bid and proposal specialists regularly spend time sharing ideas with their procurement counterparts internally?

Roundtables for staff who may be professional opponents, but should be collegiate friends.

Proposal people critiquing outgoing RFPs, sitting on evaluation panels.

Procurement people critiquing incoming RFPs, sitting on red teams.

Detailed training in procurement awareness for all those involved in proposals.

It's not buyer beware: it's be aware of the buyer.

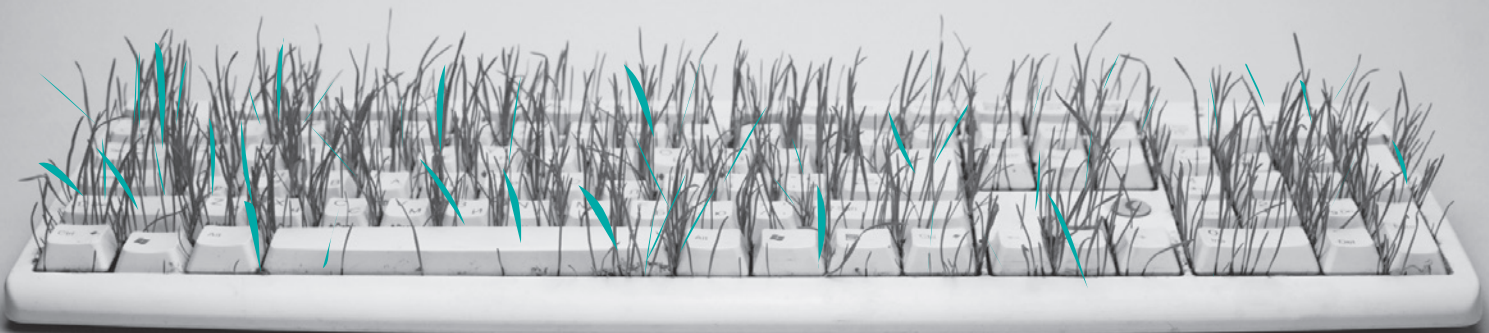
## CONTENT DOESN'T MAINTAIN ITSELF

Who has a library of pre-written proposal content?

I still maintain that most libraries of pre-written content simply enable their organisations to write poor proposals faster. From the moment you publish something in your knowledge base, it starts to go out of date.

This is about ownership of the content by the true subject matter experts in the business, and the proper resource and expertise from your proposal team to help them keep it up-to-date.

This isn't a spare time activity if the barrage of incoming RFPs ever lets up. This isn't optional. This isn't a task to be delegated to the most junior team member. It's a key cog in the engine for proposal efficiency and effectiveness.





# GETTING THE CAPACITY PLAN RIGHT

What's the saying? "You can't fit a quart into a pint pot"? (I'm not sure I actually know what a 'quart' is, but we all get the general idea!)

So how many deals do you need to support in 2020 to support your organisation's growth targets – say, medium, large and 'mega'.

How much effort, from a proposal perspective do you really need to put in on a typical deal of each type, to do the job brilliantly from pre-proposal planning to pitch?

Multiply up the numbers.

Divide by something like 160, 180.

Do you have enough staff to do the job? Or are you setting your team up to struggle? Setting them up to be stressed and over-worked?



# WEEKENDS ARE NOT FOR WORKING

Meet Erin, my daughter, who was one on Saturday. Here she is en route with us to Warsaw for a little trip the weekend before. (That's what was then the sixth tallest building in the EU, and as of Friday evening, post-Brexit: the fifth).

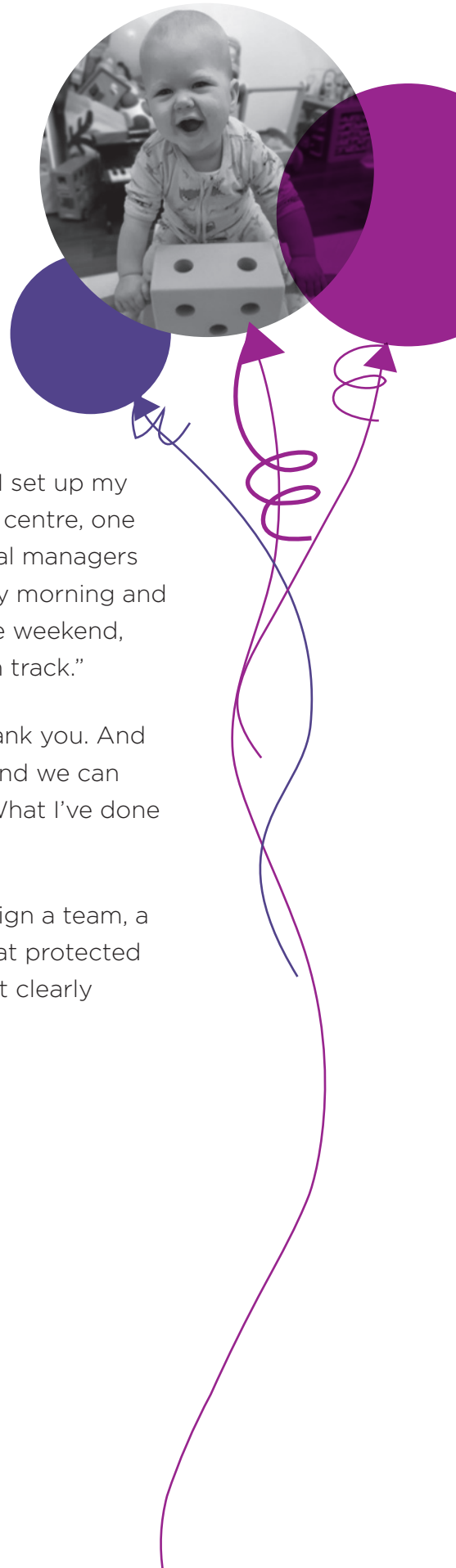


The weekend. Not for working.

I remember when I set up my very first proposal centre, one of my best proposal managers came in one Monday morning and said: "I was in over the weekend, but I think we're back on track."

And I replied by saying: "Sorry. Thank you. And when it's gone out, let's sit down and we can work out what I've done wrong." What I've done wrong.

Because it was down to me to design a team, a process, an engagement model that protected my team and their wellbeing, and it clearly hadn't quite worked.



# LEARNING LEADING TO ACTION



It's about learning reviews independently, win or lose: what went well that we need to replicate - and is there anything we need to learn from or fix?

It's about great client debriefs - and a programme of robust client audits some time later, away from the heat of the battle, to gauge how your proposal and pitch compared to your competitors'.

It's about benchmarking. Over 600 organisations have now used our free online Proposal Benchmarker tool; others appreciate that a deeper external perspective from time to time really is critical.

It's about reading the myriad of research that floods your inbox on LinkedIn. About going to events like this.

And then it's about what you do with the information. Because as Dale Carnegie said: 'Knowledge isn't power until it is applied.'



## ACTIVE IN THE PROFESSION

You know, over these past twenty years, we really have become a profession.

BJ was one of a small group of people who came together in the States in the '90s in the meeting that led to the formation of APMP. I'm still proud to have been the first chief executive of its first international chapter here in the UK in 2001.

It's great to have our colleagues from SP NL in the room: Richard Buijs and Janneke Orriens set up APMP's first chapter in a non-native English-speaking country. And now it's truly global.

If you aren't personally active in our professional body, or don't sponsor all your staff to gain the relevant certifications and attend as many of their events and conferences as possible, then I'd really challenge you to embrace the professional nature of who we now are.

Hey, here's the doctor and the anaesthetist: they did their degrees thirty years ago. Haven't read much since, mind: they've been too busy in the operating theatre, but not too many patients die...



# C-SUITE CHAMPIONS

But we need money to resource all this. We need support. We need buy-in across the organisation. That's why we started today with a keynote from a CEO.

Here's a thought: when you get back to the office tomorrow, if you wandered into your CEO's office, would they look up and say: "So what do I need to do to help after yesterday's event", or press the panic button to call security to get this stranger evicted?

Because the Return on Investment on sharpening proposal development is so overwhelmingly compelling that, at times, it's almost embarrassing.



# PROPOSALS MATTER

And then my final thought: my “20+”

What we do matters. We are the ticking heartbeats of our organisation’s growth. We’re the job creation and protection engine.

From those little proposals grow contracts that enable our companies to thrive.

And the art and science of developing them - and winning - is something that, 20+ years into my own proposal career, still brings me great joy. And I hope, it does the same for you too.



THANK YOU  
SO MUCH FOR  
YOUR TIME!

