

A woman with blonde hair is shown in profile, looking towards a whiteboard. The whiteboard is covered in handwritten notes, diagrams, and text, including words like 'TITLE', 'TEXT', 'MODIFIER', and mathematical symbols like $z = \frac{1}{2}$ and $IF(L-D)$. The background is a dark teal color with various geometric shapes in shades of teal, blue, and pink.

Winning more with a seamless capture process



Strategic
Proposals



This paper is based on Graham Ablett's presentation to the APMP's (Association of Proposal Management Professionals) Bid and Proposal Conference in Orlando during the summer of 2023. Graham, a Director at Strategic Proposals, is a leading capture specialist and Fellow of the APMP. He discussed ways of bridging the gap between the business development and proposal phases of the capture process.

Every positive action taken in the early stages of the capture process will be rewarded by a positive action during the proposal process. Of course, there'll be challenges. That's why we've curated a range of solutions, combining our own experience with best practices, to help you overcome these challenges.

Learn how to maximise opportunities to generate accurate, comprehensive, and compelling proposals that get you closer to the award of contract.

Common challenges

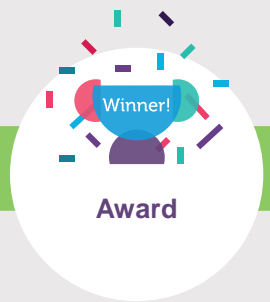
Capturing new business is a complex process that involves a multitude of stakeholders, resources, and communication channels. However, this process is often characterised by common challenges that make it difficult to achieve your desired outcome: a win! Our team identified seven common challenges that organisations face...

1.

Fragmented process

A fragmented process can lead to gaps appearing between the common phases of the capture process, as shown below.

Improving chances of winning



These gaps lead to re-inventing the wheel, the loss of critical information and forgetting why certain decisions were made earlier in the process.

2.

It's all talk!

This is what happens when the information gathered during the early stages of the process isn't captured in writing, leading to misinterpretation, confusion, and loss of important information.



3.

Herding stakeholder cats

We've all used the herding cats analogy to describe working on a team. Internal stakeholders can be the toughest to herd, i.e. keeping them up to date, engaged and onboard with the opportunity. All too often they aren't, making it almost impossible to get what you need from them at the right time.

4.

Resource stickiness

Getting the right resources at the right time can be challenging. Sometimes the cats we're herding don't make good on their promises. Many bid support teams are more focused on proposal development, meaning longer-term capture work takes a back seat. It's important to identify the right resources and retain them throughout the entire process to avoid any loss of momentum and consistency. But that's easier said than done.



5.

Clarity on roles and responsibilities

Proposal manager, capture manager, bid manager, business developer, account manager, client manager, programme manager, solution architect. Who does what? And when? Clarity on the core and wider team roles is always important. In lengthy, complex sales cycles staying focused on the job at hand is fundamental along with well-defined boundaries around "who takes the decision".



6.

Keeping momentum with potential customers

People buy from people they know, trust and like. Often there are 'dead zones' in terms of customer contact during the capture process, meaning that the relationship required to build trust is lost. Regular communication is needed across multiple stakeholders, coupled with a well-thought-out contact plan and creativity on methods of engagement.

7.

Understanding the scope and requirements

The most common reason for contracts to fail, post award, is a lack of clarity on scope and requirements. Getting a clear view on these requirements early in the process is tough. Maybe the customer doesn't know what they want or they keep changing their mind. They may even be restricted in how much they can tell you. Either way, we need to engage with them to understand and shape their thinking. If we don't do this we can't develop our solution concepts or start pricing to win.

Dealing with these seven challenges is crucial if you're going to have a smooth transition through the capture phases and hit your objectives. By addressing these issues head-on, you can achieve your desired outcomes. Here's how we suggest you do that.

Ensuring a smooth transition between phases

We've created four simple ideas for you. Use this list to benchmark whether you have these capabilities, and if not, what you need to do to fill those gaps.



An integrated process focused on the objective

Clearly, to not miss anything you need a fully documented end-to-end process, starting from the business development phase right through to award, supported by guidelines, roles and responsibilities and checklists. It's a winning process which we call the **SP Way**. At all times, we're focused on one thing: the objective. Winning that bid.

Once you have the right resources in place and your capture plan has gathered momentum you need to make sure nothing gets lost between the phases. Writing things down ensures the right data is captured and integrated into the process so that your key activities link together.

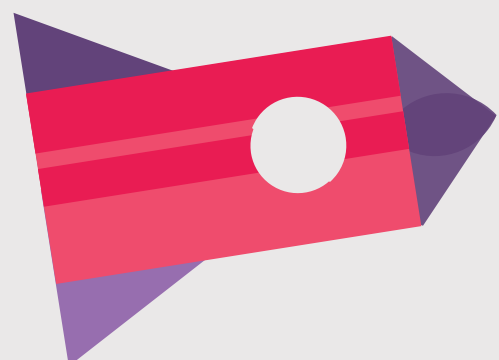
The colour coding in the diagram below shows how information flows through the process. See how the win strategy flows into the development of the win themes, storyboards and pitch.

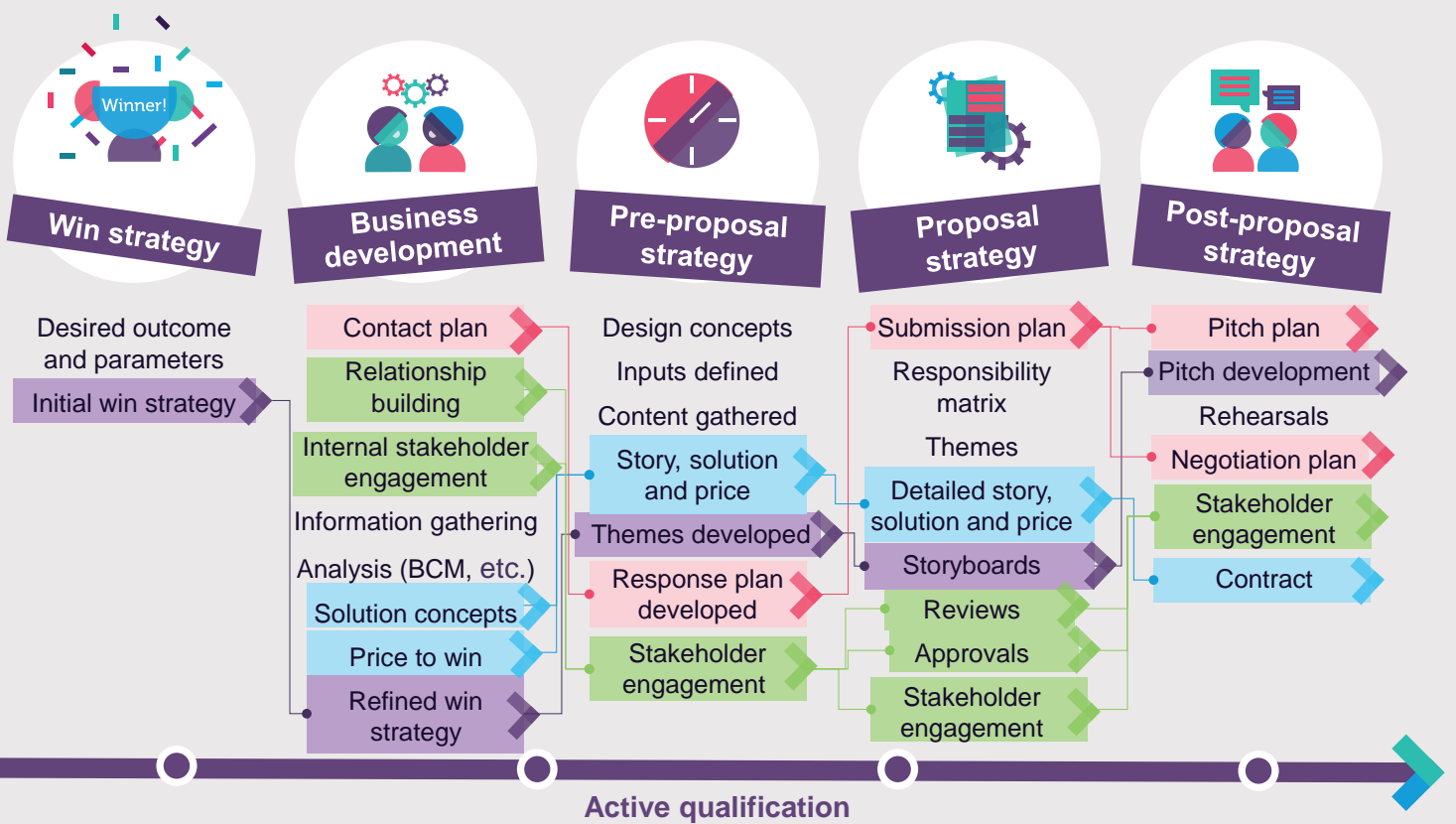
Keep focused on the objectives.
Ask yourself: is what we're doing now helping us get into pole position to win the deal?



A committed and consistent team

You need a committed and consistent team to deliver your process and capture plan. After quickly identifying what you need, you must ensure management commit to those resources. Failing to get what you need at the right time reduces your ability to win and could spark a re-qualification of the opportunity. It's a strong lever to use with management and maximises your chance of getting the consistent commitment you require right across the capture process.



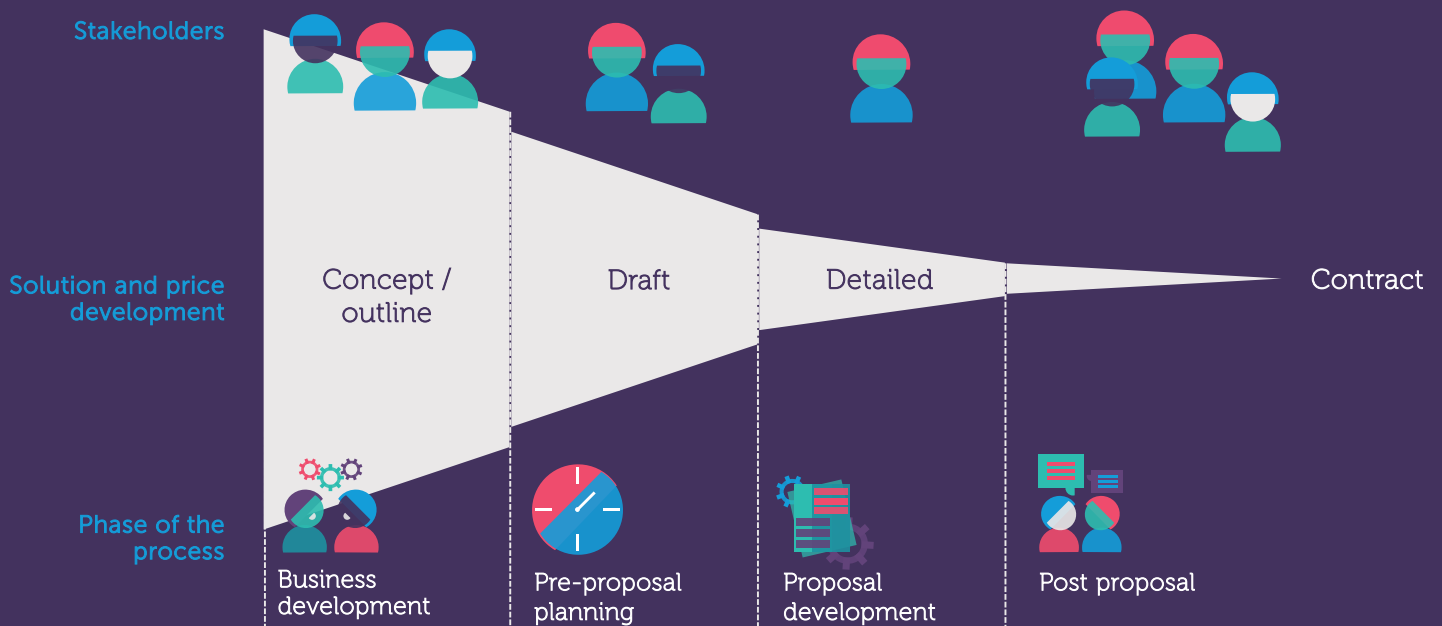


Another thing that supports integration is active qualification. Using point-in-time checks or gates on how winnable the opportunity is should be critical milestones and occur in each phase. The gate should review what can be done to improve the chances of winning in each subsequent phase. This creates a link. A proactive capture manager should actively manage those actions up to the next gate.

Solution 3

Solution and price development integrated with client engagement

Many organisations don't develop a solution until their customer issues a set of requirements. This reactive approach removes the opportunity to both understand and influence the customer's needs and thinking. The diagram below illustrates how the solution matures through the process, becoming precise and detailed at contract.



The people across the top represent engagement with multiple customer stakeholders. Initial concepts and ideas mature into an outline solution – perhaps with a strategy for each identified workstream, such as management, implementation, technical approach. Once everyone's satisfied with the strategy, the solution is developed into a draft, then into more detailed versions through the next phases. The opportunity to influence comes by sharing your ideas with the customer in the earlier stages. The feedback from customer engagements helps develop the solution's next iteration.

You need to find clever ways to engage with, and influence, the customer to get what you need to develop the solution. These could be through presentations, site visits, sharing case studies, workshops with your experts, etc. It's essential to have a clear plan for each interaction, using all the various methods at your disposal, to develop relationships and demonstrate value.

Solution

4

Internal stakeholder management

As well as having a comprehensive contact plan with your customer, you'll need to build a communications plan for your internal stakeholders. The capture manager should consider the appropriate communications during each phase for the core team, wider team and management team. You want everyone involved to be fully engaged and aligned with the opportunity.

Consider core-team catch-ups, face-to-face meetings closer to milestones, frequency of progress emails, briefings to management, and so on. Just like customer meetings, these interactions require careful planning and execution.

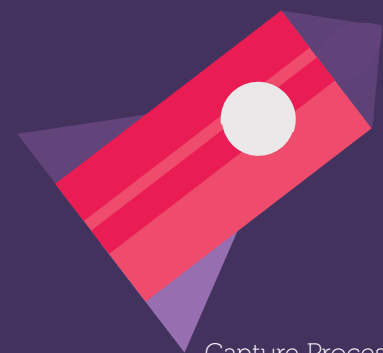
End-to-end, documented, objective-focused process that has integrated phases


An outcome-based approach to assess resources required to gain commitment

Integrating customer engagement, solution development and pricing-to-win approach

A strong communications plan, including social media, for internal stakeholders that ensures buy-in, engagement and consistency of people and decision making

Get these things right and we guarantee that the transition from phase to phase will be smooth and effective.






We had a large effort that wasn't going well. Your expertise and guidance put us right back on track and ultimately helped us win the deal

VP of Marketing & Sales,
Commercial Bank

Strategic Proposals helped us win more business following their benchmarking, training and live tender support service. With their support, our win rates have quadrupled and our cost of sale has halved

Commercial Director,
Professional Services



You made a huge impact in a very, very short space of time. What you did was exceptional

UK Head of Major Bids,
Utilities

Find out more about our free-to-use tools:

