

# Active qualification

Ensuring you're on the right  
path to winning

56

81

72

# Active qualification

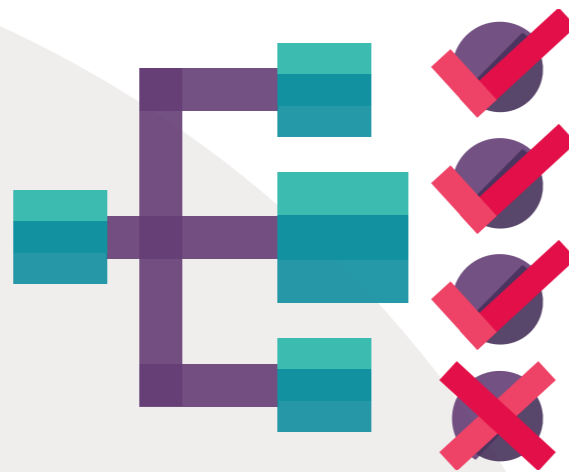
## What is it, and why does it matter?

Active qualification is a strategic approach used by high performing teams to ensure they keep on the right path to winning. It combines traditional qualification gates with capture tactics. This paper will show you how.

## Highlights from recent research on qualification

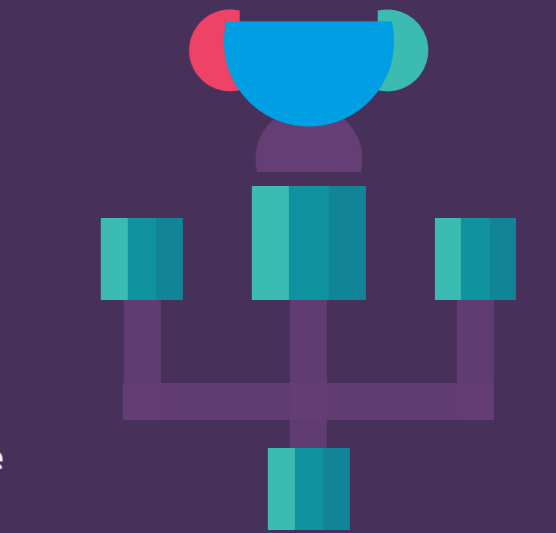
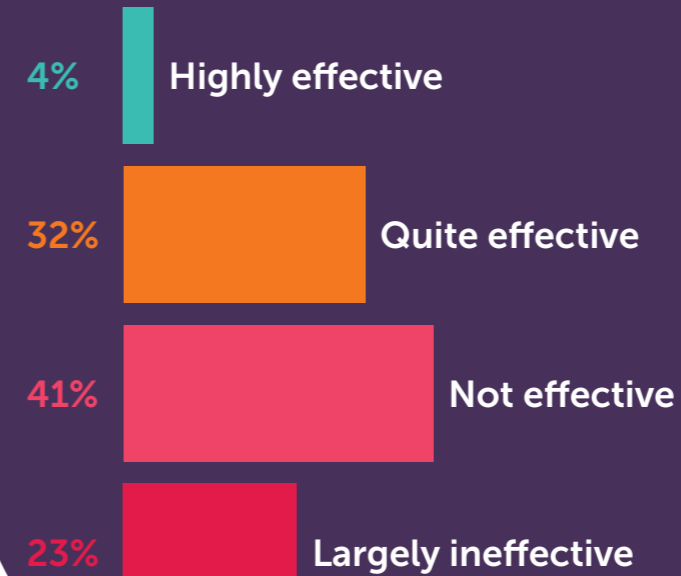
We asked bid professionals a series of questions to understand how their organisations do qualification. Here are two key findings:

### 1. How effective is your current qualification process?



**30%** of organisations don't have effective qualification processes

### 2. How effective is your current qualification process at helping you improve your chances of winning?



Only **1 in 3** organisations use their qualification process to improve their chances of winning

### What does this mean?

Organisations are using qualification to filter out the good from the poor opportunities. That's great. Presumably then, the majority of bidders are winning more than they're losing? If you're not, then perhaps you're not being as stringent as you should be!

It's clear from the results that the majority of bidders do not use their qualification process as a tool to help them improve their chances of winning. This indicates many are still using the traditional approach that prevents poorly positioned bids being worked on when the RFP lands. This contrasts to a more progressive approach where qualification is seen as an opportunity to understand what you need to do to improve your chances of winning earlier in the process.

## Constant course corrections

Active qualification is like keeping your hand on the tiller throughout the often long lifecycle of your bidding opportunity's journey. Like any ship's captain, you need to constantly make small adjustments to ensure you arrive at your destination in good time and in good shape.

Active qualification checks that you set off in the right direction and then you remain on path to achieve your objective at various milestones along the way.

Pursuit decision

Business development

Pre-proposal planning

RFP received

RFP submitted

Presentation

Negotiations

Win



## Key principles of active qualification

We don't need to change what we know works. Active qualification is an enhancement to the traditional qualification gate process. To start with we need to test the opportunity at regular intervals to assess how winnable it is, using familiar criteria:

	Pursuit	Business development	Pre-proposal planning	Proposal development	Are there any red flags?
<b>IS IT REAL?</b> – A genuine opportunity with budget, timeline and approval from the customer.	Red	Amber	Green	Green	Two red flags
<b>CAN WE DO IT?</b> – You understand what your customer needs and know you can deliver it.	Green	Green	Green	Green	None
<b>CAN WE WIN IT?</b> – You know the competitive landscape and that you'll beat the competition.	Amber	Amber	Green	Green	Two red flags
<b>DO WE WANT IT?</b> – It's in our sweet spot and ties in with our business strategy.	Red	Amber	Green	Green	Three red flags

You need a nice and simple tool like this. As the captain, you can see that we're part way through our voyage and having assessed our progress against the criteria, we're doing okay, but we're not yet in a winning position. If the RFP landed now, we'd be looking out at some stormy seas. However because we've time, we've the opportunity to adjust our course and still get to our final objective.

Using the RAG status you can immediately see that we're amber against three of the criteria. Not great, but for two of them we've moved from red, so we're making progress. However, you can see that we're trading water when it comes to understanding the competitive landscape. We need to know why and what we're going to do about it.



You can also see that we've identified some red flags. These are where we've spotted some blockers or issues that are hindering our journey. Identifying these are key, as is working out the specific actions that are required to remove these obstacles from your journey to winning.

The criteria shown here are high-level. You might have layers beneath that you'll use to further scrutinise your opportunity. The secret is to be consistent with the questions you ask and use the learnings gained from previous journeys to help get you to your desired destination.

Let's dive in to a bit more detail to try and bring this to life for you.

## Is it real? – business development phase

Imagine we're in the business development phase. If we dive in to some of the sub-questions under the "Is it real?" qualification criteria, we can start to pinpoint why we're weak and what we need to do.

Win factor	Current position	Current score	Actions to improve	Next review score	Maximum achievable score
The customer has a real business need with known benefits, clear objectives and requirements		0		Target 1	2
The customer has the necessary finances available	0 – We haven't had chance to meet the customer.		<ol style="list-style-type: none"> <li>1. Build your contact plan</li> <li>2. Engage stakeholders, identify coach – review</li> <li>3. Analyse information gathered – review</li> <li>4. Attempt to influence their requirements</li> </ol>		
The customer has a clear and realistic project plan and the necessary team in place with senior sponsorship	4 – The customer has told us directly about their needs, benefits and objectives. They've shared their high-level requirements, captured them and validated them. We've influenced their thinking.				
It is worth the risk cost and hassle to move from incumbent					
This is a real opportunity not just a market-testing exercise to beat-up the incumbent					

Look at the first row of the table. You have a pre-defined set of options to select that best describe your current situation (we're only showing you the lowest and highest rated responses). At present we've not met the customer, so we've selected zero. We then consider what actions we need to do to change this. Using previous learnings we're presented with some ideas – which we can decide to use, or we can pick our own. The options shown are pre-determined based on the current position, where we're at in the opportunity's lifecycle, and what's worked well in the past.

We then also assess what's the best score (or position) we can realistically achieve by the time the customer awards the contract. As you can see,

the best we can do in this example is get to a two. And we then set ourselves a target of getting to a one before our next review.

If we didn't feel getting to a two for this 'win factor' item was going to be good enough to win (and historical data may show you this), then we'd turnaround and head back to port. If we hadn't got to a one position by the time we reviewed our position again, then we'd also consider doing the same. Otherwise, we continue on our journey.

## In summary



We could get better at qualifying opportunities

Taking a more active approach to qualification helps improve chances of winning


Assess win chance throughout the opportunity lifecycle using a defined approach

Use learnings to provide ideas to users on how to increase their chances of winning

Use the output of your active qualification tool as an input into your decision gates

Identify weaknesses and where you need to improve (and by when)

If you'd like us to perform an independent review of your current approach to qualification then please contact us and we'll conduct an initial exploratory call at no cost. You might also consider assessing your wider capabilities to win by using our **Proposal Benchmarker™** tool.



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

Try our free-to-use tools:



☎ 0800 009 6800

✉ [info@strategicproposals.com](mailto:info@strategicproposals.com)

🌐 [strategicproposals.com](http://strategicproposals.com)

🌐 Strategic Proposals

📄 PAS 360

[proposalbenchmarker.com](http://proposalbenchmarker.com)

[myproposalcoach.com](http://myproposalcoach.com)