The two questions we posed

Five to ten things that...
...you believe have the biggest impact on your proposal function’s success.

Three to five things that...
...make it fun and/or rewarding to work in your proposal function.

The biggest impact on your proposal function’s success?

1
2
3

Research methodology

- Online survey – Q1 2014
  - Promoted via The Proposal Guys & LinkedIn
  - 1310 data points
- Plus 17 x 1:1 interviews
- Responses grouped into common themes
- Peer review of analysis
- Illustrated with specific quotes from survey respondents

Impact on proposal success
The near misses

Storyboarding process
Proofreading
Funding
Case studies
The team following my directions – because I’m always right!
Flexible work patterns & recognizing the importance of family
The countdown
20: Capacity

- Being fully staffed
- Regular reviews of workload
- Forecasted demand
- Not being stretched across too many projects

19: Caliber of proposal staff

- A proposal manager with high standards who rolls up their sleeves
- A strong leader who knows what she’s doing
- If I don’t recruit good enough people, that will damage the brand of the team
- We hire exceptional people (and pay them appropriately)
- Expert proposal skills

18: Quality of writing

- Conversing in one clear voice
- Easily understood
- Concise language
- Crisp writing that addresses the client’s concerns

17: Feedback & learning

- Always sharpening the saw
- Providing recognition and thank you soon after submittal
- External consultants who helped us check / adjust vision and stay ahead of the curve
- Ensuring lessons learnt are applied
- A ‘success wall’ with mails from satisfied sales folks and end clients
16: Tools

- Technology that works
- Access to state-of-the-art tools and technologies
- Leveraging technology in a virtual environment

15: Communication

- Effective communication
- Regular weekly meetings and conference calls
- An engaged team
- Stakeholder communication

14: Design

- The look and the feel of the proposal
- Proposal aesthetics
- Great graphics which support the story
- Ensuring that the proposal is visually stimulating

13: Knowledge Management

- Effective, up to date 'answer database' that can be tailored to the client
- Thorough, up-to-date, professionally written library
- Great content library which is updated regularly and easy to adapt
12: Qualification

- Qualifying opportunities to identify those that we have a **real chance** of winning, and taking **bold decision** to not pursue those where we don't
- Qualifying **EARLY** and qualifying **OFTEN**
- Everything is qualified out until you show me a reason otherwise

11: Proposal process

- A standard, scalable and flexible process that supports the business and that internal clients embrace
- A clear, well communicated (and understood!) **bid and proposal process**
- A repeatable, defined, managed and optimizing proposal process
- **Execution on proposal fundamentals**

10: Offer

- A **compelling offer**
- Knowing how to solve your customer’s issues
- The ability to provide an excellent technical solution with innovative ideas
- Strong solution for the customer’s need
- Price competitiveness

9: Sales capability

- Sales competence
- An existing and **meaningful** relationship with the client **before the actual RFP**
- A great customer relationship through a clear engagement strategy
8: Recognized role

- Recognising the proposal team as an integral part of the business development community
- Sales staff accept & welcome contribution by professional bid staff
- Understanding that proposal management is a profession
- Awareness and recognition of the value we bring outside of formatting and project management
- People aspire to be in the bid team

6: Training

- Training
- Training
- Training
- Training – at all levels
- Training & ongoing development

7: Pre-proposal planning

- Strong sales engagement with the proposal team prior to the RFP landing
- Advance preparation
- Knowing the opportunity inside out before bid release
- Real understanding prior to the RFP, to create real win themes - not just guesswork

5: The right team

- Having the right people on our team
- A core proposal team who are high performers
- Dedicated and committed resources
- Working with engaged and motivated subject matter experts
- SME engagement, buy-in and accountability
4: Project management

- A kick off meeting as early as possible at which a schedule is established and agreed on by all team members
- A challenging schedule with realistic deadlines
- Respecting deadlines
- “Knowing that Murphy was an optimist, so have a Plan C & D when Plan B fails!”

3: Winning attitude

- A deep dislike of being second
- The drive to go that extra mile
- Hard work
- We laugh a lot!
- Positive state of mind
- Determination: not taking no for an answer
- Not just aiming for the lowest bar
- “We can’t wait” rather than “not another one”

2: Sponsorship

- Executive leadership support and backing
- Understanding by key management in the importance of bids
- Top Level Management trusts and recognizes value of the function
- Top management godfather / godmother & their active support.

1: Strategy

- Ensuring proposals tell a story
- A clear strategy based on Customer, Competition & Capabilities
- Realistic acknowledgement of strengths vs weaknesses
- Clearly outlining ‘why us’ - state the benefits to the customer if they choose us over others
The recipe for success

<table>
<thead>
<tr>
<th>20</th>
<th>19</th>
<th>18</th>
<th>17</th>
<th>16</th>
<th>15</th>
<th>14</th>
<th>13</th>
<th>12</th>
<th>11</th>
</tr>
</thead>
<tbody>
<tr>
<td>Capacity</td>
<td>Caliber of proposal staff</td>
<td>Quality of writing</td>
<td>Feedback &amp; learning</td>
<td>Tools</td>
<td>Communication</td>
<td>Design</td>
<td>Knowledge Management</td>
<td>Qualification</td>
<td>Proposal process</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>10</th>
<th>9</th>
<th>8</th>
<th>7</th>
<th>6</th>
<th>5</th>
<th>4</th>
<th>3</th>
<th>2</th>
<th>1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Offer</td>
<td>Sales capability</td>
<td>Recognized role</td>
<td>Pre-proposal planning</td>
<td>Training</td>
<td>The right team</td>
<td>Project management</td>
<td>Winning attitude</td>
<td>Sponsorship</td>
<td>Strategy</td>
</tr>
</tbody>
</table>

Three of those areas needing more focus in your organization

What makes it fun / rewarding?

Find someone you don’t know...
Introduce yourself...
Tell them the last thing that made you smile in your job...

What makes it fun / rewarding
**Fun – favorites - 1**

Winning, and any perks that may be associated with a big win

Seeing the **bottom line increase** for the business as a result of our work

When I am **appreciated** for the time and effort I put into a proposal

**Fun – favorites - 2**

Finding **laughter** every day

The **race** to the due date

**Heroically** solving problems

Showing sales people it is **not just about price**

Knowing that you’ve **made a difference**

Contact with the most senior people in the business

**Fun – favorites - 3**

Creating something bespoke for each customer & seeing the impact it will have on their business

Producing work that everyone is very **proud** of!

Piecing together a **puzzle** that becomes a finished proposal

The **adrenaline** rush that comes with doing a lot of good work in a limited time frame

Creating **kick-ass proposals**

**Fun – favorites - 4**

Positive feedback from the client - being able to do something beyond their capabilities and expectations

Making the front page of the Financial Times for a deal I won!

Travel to interesting places

Meeting new people with diverse talents

Hearing the opposing bid manager saying: “I cried when I heard you’d won.”
Fun – favorites - 5

Complexity at the beginning. And, at the end, when things to get clear and simple... like the sky after a thunderstorm.

And then there’s the most important thing...

“Donuts”

Thank you so much!

Jon Williams & BJ Lownie  
Principal Directors, Strategic Proposals

jw@strategicproposals.com  bj@strategicproposals.com
Website - strategicproposals.com  
Blog - proposalguys.com

APMP®
www.apmp.org
Jon Williams is the Managing Director of Strategic Proposals in the UK. He established the business in 2001, initially as a practice within PMMS (the international purchasing consultancy), where he served as a main board director.

Jon is recognised for his passion for proposals, championing proposal management best practice as he and his team help bidders to capture ‘will-win’ deals and to bring about radical increases in win rates. He has completed proposal assignments in over thirty countries worldwide, with clients in sectors such as IT, telecoms, banking, construction and logistics. His consulting experience includes a highly successful spell as the interim Head of Bids & Tenders for one of the UK’s leading insurance companies, taking win rates from 20% to 70%.

A polished and inspiring speaker, trainer and writer, Jon was elected as the youngest-ever Fellow of the Association of Proposal Management Professionals (APMP) in May 2006. He is an accredited Proposal Professional, as well as being an APMP Approved Trainer and examiner and a past member of APMP’s Accreditation Steering Group. He served as the first Chief Executive of the UK chapter of APMP in 2001-02, winning APMP’s worldwide Leadership Award.


He presents regularly to great acclaim at sales, proposal and purchasing events around the world. In 2005, he delivered mainland China’s first public proposal training course, and in October 2010 Jon was honoured to be the keynote speaker at “Making a Splash”, Africa’s first-ever proposal management conference. He is the only speaker from outside the US to have been selected to present at ten consecutive APMP worldwide conferences, where his sessions have included several opening/closing addresses.

Jon previously set up and led Compaq's Strategic Bid Centre, where his 18-strong team managed major UK and global bids, increasing win rates to over 80%. He was a member of the senior management team of Compaq’s $1bn+ Commercial PC Group in the UK & Ireland.

A former winner of The Observer Mace, the national schools debating championship, Jon graduated from Durham University (in Mathematics) in 1989, before joining The Industrial Society to lead the UK's largest non-political student organisation. In five years at ICI, he worked in purchasing, sales and IT, before joining the management buy-out team that won the Thames Trains rail franchise in 1996. Here, Jon headed the IT department, delivering a radical overhaul of IT procurement and service provision. He led a project on Customer Information Systems which reached the final of the Rail Industry Innovation Awards, whilst he was also shortlisted for the UK's national IT Training Awards. From 1997-99, Jon was Strategic Purchasing Manager for Barclays Bank, running a major global outsourcing project.

Jon lives in London and has a 14-year-old son. His leisure interests include travel, restaurants, cooking and fine wine. Under a pseudonym, he also writes award-winning fiction, with four published books to his name; his stories have also appeared in print in several magazines, whilst his websites have attracted over ten million hits.

Highly respected as a thought leader in the proposal profession, Jon has a track record of outstandingly successful achievement - consistently attracting excellent feedback from senior executives, course participants, evaluators and proposal professionals alike.

Jon can be reached via jw@strategicproposals.com and on +44 (0)781 333 2294.
BJ Lownie is the Director of Strategic Proposals LLC. As it says on his business card, and as those who know him and have worked with him will attest, BJ is truly “Passionate about Proposals”. He has 30+ years’ experience within the proposal arena, has worked on hundreds of proposals and has had thousands of people attend one of his presentations or workshops. He is a recognized thought-leader on proposal development and a popular and sought after presenter.

BJ has worked on proposals and presented workshops on five continents and in almost every major country. He has worked in many different business sectors and industries, with clients in high tech, manufacturing, investment banking, healthcare and many others. His clients look to him for guidance in developing their capabilities to produce high-impact, high quality proposals, and doing so in a highly efficient manner.

Demonstrating his commitment to proposals as a profession, BJ helped establish the Association of Proposal Management Professionals (APMP). He is an elected Fellow of the organization and is also certified at the highest level (Professional), having been one of the first to achieve this distinction.

Known for presentations and workshop which are informative, enlightening and entertaining, BJ is a featured and favorite speaker at major industry events and proposal related conferences. He has presented at almost every major conference the organization has held, including having presented the keynote at the first APMP conference in 1989, the first UK conference and at over twenty annual conferences.

Along with Jon Williams, BJ authors the popular blog, “The Proposal Guys” (www.theproposalguys.com). He has published articles in the Journal of the Association of Proposal Management Professionals as well as in the Perspective, the organization’s newsletter. He is also co-author (with Jon Williams) of the recently published “Proposal Essentials: Win More Win More Easily” (available on Amazon).

BJ brings the ideal back ground to his work in proposals: His educational and working background includes journalism (working for Newsday, a major daily newspaper in New York), and engineering and business (having worked for Digital Equipment Corporation and other hi-tech firms.) This combined perspective of writing, engineering and business allows him to see a proposal from all perspectives.

Those involved in proposals have come to look to BJ for his keen insights and observations regarding proposals. After 25+ years, this still surprises him as he sees it as all just being common sense. But then, as one of his favorite authors/philosophers, Mark Twain, has observed, “It seems to me common sense isn’t all that common.” BJ brings common sense, and a whole lot more, to his work.

When not on the road or waiting in an airport, BJ resides with his partner Carol in New Hampshire. On the rare occasion that he is not working on or speaking about proposals, he enjoys training dogs (American Staffordshires), motorcycling and skiing (he is a professional ski instructor). BJ is an avid reader - often reading several books a week - and he is always open to giving or getting a recommendation for a good read.

BJ’s e-mail address is bj@strategicproposals.com and his phone number is 603 305 747.