



Strategic  
Proposals

# HOW

the best

# WIN

2022



July 2022

# Contents



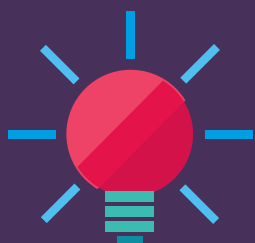
Strategic  
Proposals



# The power of proposals

Over the past five years, over 1,000 organisations have completed the online, 100-question Proposal Benchmarker™ self-assessment.

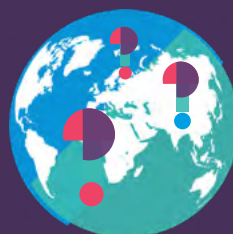
This white paper analyses what the data shows us from their responses. We're going to give you data-driven answers to the following questions and more:



Which market sector has the most mature proposal capabilities?



What are the real struggles facing bid and proposal teams? ...and what do the most successful teams do that makes a difference?



Which country leads the world in bidding terms?



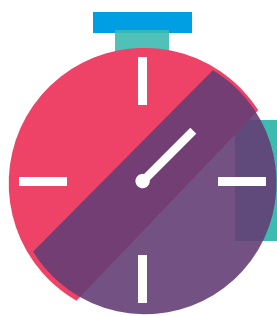
And is there a correlation between your proposal capabilities and your win rate? (A clue: there is. Overwhelmingly!)

# A little history

Back in the 1990s, BJ Lownie – who founded Strategic Proposals across in the US – created one of the world's first formal proposal benchmarking models.



In early 2002, once we'd opened our doors in the UK, we added more depth and detail to the model. It enables us to objectively assess an organisation's proposal capabilities against 42 criteria.



1990

2002

The benchmarking process involves reviews of recent submissions, interviews with stakeholders and clients, and lots of data gathering. And we've used it to design and build hugely successful bid centres for more than 100 organisations around the world.



Then, as we planned how to celebrate Strategic Proposals' 30th anniversary back in 2017, we decided it was time to democratise benchmarking.

- Take the essence of the benchmarking model
- Distil it down into 100 questions
- Put it online free
- And give everyone who completes it a bespoke report with recommendations.



# and context

And the tool we developed, the Proposal Benchmarker™, duly launched in spring 2017.



This white paper, tied into a session delivered during Strategic Proposals' 2022 spring webinar series, represents the first major published update to our initial research.



Since then, we've refreshed the question set in the tool twice, to ensure it continues to provide a stretch target for even the most successful teams.



2017

2018

2022

In 2018, we produced a white paper with the early results, and presented "How the best win" at APMP's Bid & Proposal Con in San Diego.



As a result, what we're sharing is one of the most in-depth, real-time profiles of bidding organisations that exists in the world today.



# Who's joined the party?

The analysis draws on benchmarking data from over 1,000 organisations across 32 countries, from Portugal to Peru to the Philippines.

As with any survey in our world, we've seen an amazing number of different job titles amongst those who've completed the assessment: 365 in total, one for every day of the year. The most common job title in there is "bid manager". Our favourite: "master of inspiration".

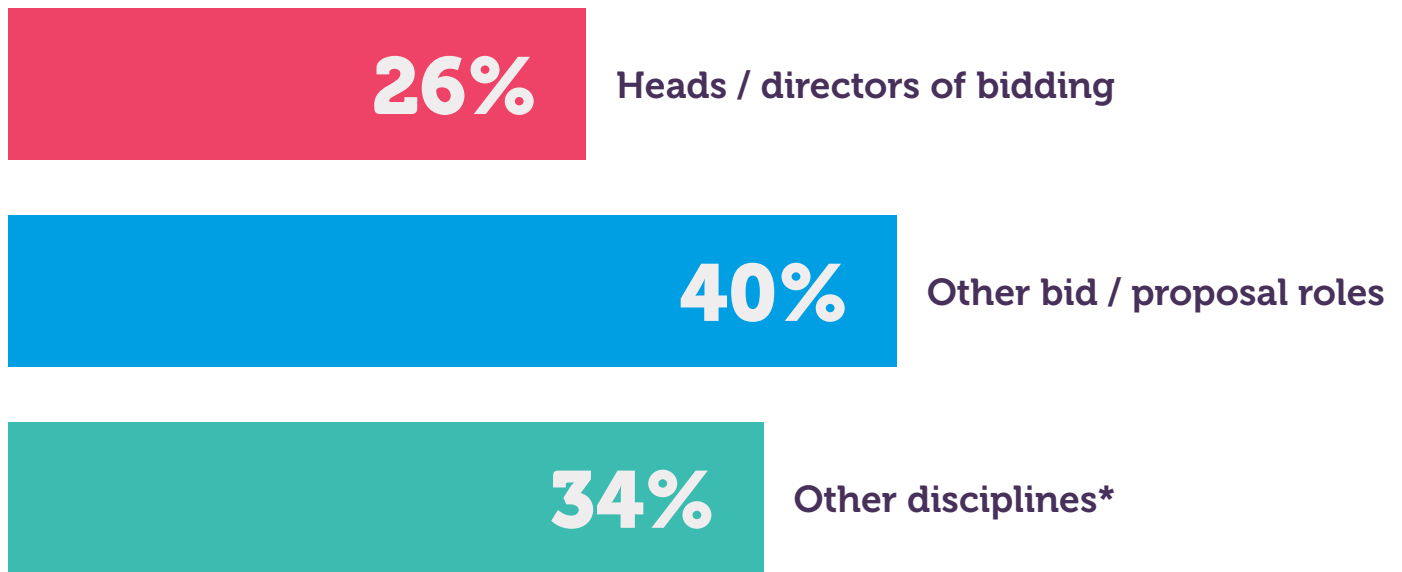


**Bid Manager**

**Master of Inspiration**



In terms of roles:



*\*a mix between salespeople and sales leaders, heads of marketing, and a few C-suite executives*

### **A few caveats**

Geographically, about 70% of the responses come from the UK and US – which perhaps reflects the history of the proposal profession, and that the Benchmarker is in English. So there's maybe a slight skew to the data, which we need to keep at the back of our minds. Disraeli of course once observed that, "There are lies, damned lies and statistics."

Is the data in our model an absolutely perfect cross-section of the world of bidding? No.

But with about 100,000 data points in the model, and a lot of consistency as we dice the content in different ways, we're reasonably confident that what we're finding is pretty robust.

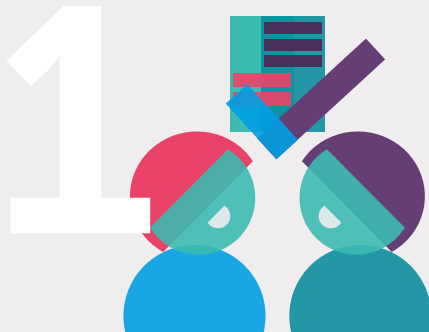
And if you have better data, we'd love to compare ours to yours. The very point here is about giving back, about sharing knowledge to advance our profession.

# Areas of excellence

Let's start with the good stuff: where do organisations think they perform consistently well when it comes to their bid and proposal capabilities?

Here's a top ten list showing the questions for which participants gave their organisations the highest score:

## Governance



All proposal content is approved before it's issued, to ensure the deal would result in good, profitable business for us if we won. (In other words: we're all scared of the chief financial officer!)

## Proposal / pitch alignment



The story and content of our pitch always closely aligns to the written proposal. (Which is good, because there often used to be a disconnect here.)

## Virtual teams



We're great at managing virtual proposal teams, when it's simply not possible to bring contributors together. (And you'd expect that, after the last couple of years, wouldn't you?)

## Visual



Whenever we're not restricted by customer requirements, we always use graphics and images to help tell our story. (Our challenge to this is that "it depends how good they are!")



## Senior exec. support



Senior executives are regularly involved, especially on major proposal efforts. (Although we probably all have experience of where that's been more hindrance than help, right?)

## Well-structured proposals



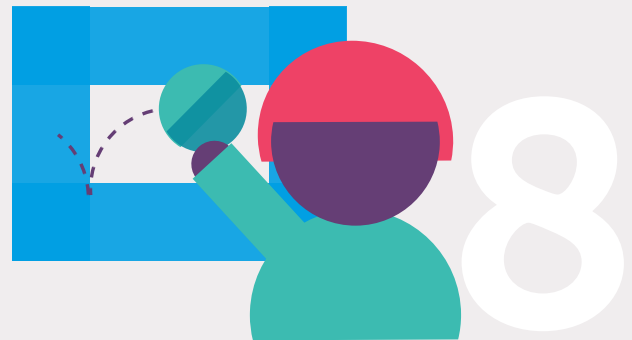
Our proposals are always well-structured, have a logical flow to them and are easy to navigate for the evaluators.

## Tailorable templates



We have a set of contemporary, easy-to-tailor "standard" proposals and pitches for smaller or less strategic deals. (That sense of enabling sales colleagues to self-serve for small opportunities seems to be bedded in.)

## Engaging pitches



Our pitches no longer feel like "death by PowerPoint" (And we'd hope so: it's 2022 not 2012!)

## Credible professionals



Staff in the proposal support function are viewed within the business as experienced, credible professionals.

## Kick-offs



We run an effective kick-off workshop for every bid, to connect, brief and motivate team members.

So, you know what? If you're doing this stuff well, that's great – but it's really nothing to write home about. Lots and lots of people – your competitors - are doing them well too. And if there are things on this list that you're not doing, then perhaps you are at risk of slipping to the back of the pack. This list is pretty much a baseline for bidding in 2022.

# So what's giving the experts out there the

80% of the questions that get the lowest overall average scores fall into just four categories. Let's explore them.

## i) Weak management of pre-written content

Organisations have been struggling to maintain libraries of pre-written content for over 20 years! This isn't a new thing. Yet it's an area in which too many companies still struggle.

Too few have explored the benefits of professional content management software, such as Loopio, RFPIO, Qvidian or Qorus. Too few have the right resource in place to manage (indeed, "curate") the library effectively.

And it's too rare for content in the library to be owned by the relevant subject matter experts in the business, accountable for keeping it up to date. (And without that ownership, experience would suggest, content is forever destined to wither on the vine.)

## ii) Poorly trained teams

We've long observed that "All those involved in proposal development must be trained in the necessary skills" – but this is an area that's woefully overlooked.

Very few organisations have thought about bid and proposal training needs in any structured way. And very few of those involved in bid presentations receive training before they stand up and pitch to customers. Still too few organisations have supported their staff to gain the level of APMP certification appropriate to their role.

## iii) A lack of competitive intelligence

We write a proposal with the goal of convincing the evaluator "Why us, why not them?" And yet too few of us know enough about *them*.

Very few organisations have a robust process for managing bid competitive intelligence, to be used to provide insights when working on their strategy, solution and storyboards. It's all rather left to chance, rather than being treated as a potential core competence for the bid function.



# e proposal and pitch e biggest headaches?

## iv) A reactive approach

We ask whether bid teams have clear visibility of the major new business that will require a written proposal over the coming twelve months: they don't. We ask whether, on the majority of recent bids, they'd influence the clients' requirements and decision-making in their favour. They hadn't.

We ask whether they steal a march on the competition by submitting proactive proposals and pitches without waiting to be sent an RFP: very rarely.

The bid profession is still too often reactive – simply spending almost all of our time working on RFP responses, one after the other.

## Outside these four major areas

There are a few other questions where teams consistently seem to struggle:

- "We're adept at using external support to complement our in-house resources, to help with critical deals or with peaks in workload."
- "We know the cost of developing each proposal that we submit."
- "We do regular client audits of proposal quality."
- "We have a strategy to recruit apprentices or at least less experienced team members who we then mentor and train up to be bidding professionals."

As a result, we too often hear a sense of frustration, as people know that they could have submitted a better proposal were it not for resource constraints that impeded them. And that feels wrong, given that **bidding should be the growth engine** – the job protection and creation engine – for so many firms.

So the data would show that if you're struggling with this set of issues, you're not alone. Take confidence from those who have tackled them successfully. There are solutions to hand.



# Things can only get better?

So let's find some good news. What are the areas in which we're seeing improvement, if you measure scores in the last two years against scores from 2017-2019?



Although the number's still woefully low, far more companies are building processes to manage **renewal proposals** – rather than waiting to get onto the slippery slope of the competitive tender

There's **dedicated space** in which teams can work creatively on bids. With the opening up of offices, there's now a great opportunity for proposal teams to work out how to optimise the blend between remote and face-to-face working.



There's far greater **continuity between proposal and the pitch** – both in terms of team membership and collateral. And that includes proposal professionals getting more involved, more regularly in the presentation stage.



Although it's still too low, there's more **learning from experience**. More objective learning reviews. More client audits. And more teams are spending time comparing what actually happened when you came to deliver the solution to what had been said in the bid.



And the biggest increase of all? That's actually in response to the question that asks whether: "The head of the bid / proposal centre is a **senior executive** who commands respect across the organisation." Perhaps organisations are beginning to appreciate the value that real leaders bring in this area.



# Sector strengths?

When we analyse the data by sector, which is the very best at doing proposals? And the answer is... well, there's actually very little difference.

Still, we all love a league table – so below are the top performers, in decreasing order, from those sectors where we had a statistically significant number of responses.

## SECTOR STRENGTHS LEAGUE 2022

### TOP PERFORMERS

### RANKING



Health

1



Property

2



Transport

3



ICT

4



Construction

5



Business admin and support

6



Professional services

7

One curious finding. Those of you who know the history of the bidding profession will know that in APMP's early days, it was pretty much dominated by the defence industry. And guess which sector ranked bottom of our list? Yes: defence.

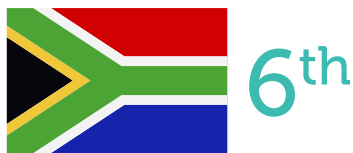
Of course, procurement there is often pretty regimented – but there's perhaps something there for defence contractors to ponder: a potential to embrace new ways of working, breaking out from the echo chamber and learning from other sectors – as the profession has from them in times past?



# The best country in the world is...

So which country lifts the trophy for the highest average capability score?

We've only done this for the dozen countries with the most respondents: if you're the one person in Colombia who's bidding brilliantly, according to their results, we'd love to meet you, but the sample size isn't big enough to really count.



**South Africa** – perhaps, a testament to the wonderful APMP chapter there and to the work of nFold, our fabulous business partners.



**The USA** – it's interesting: that's where APMP was founded, but anecdotally we've shared for a while that we don't think the profession has advanced there as quickly as in other countries around the world.



With actually a reasonable jump in scores from fifth: yep, that's those of us here in the **UK**.



**Australia** – Nigel Dennis, from our Australia partner, BidWrite, won't let us live this down, just like he doesn't when they beat us in the Ashes at cricket.



**Canada** – interesting, we thought, to see quite a divide across the big North American border.



**And the winners: the Netherlands.** I think we're probably going to have to buy a bottle of champagne for our colleagues in Strategic Proposals NL, Richard Buijs and Janneke Orriens, who really have done so much to help shape the profession there.



# Win more, win more easily



But, we hear you cry: does all this matter?

Underpinning our benchmarking methodology for two decades has been a categorisation of proposal support functions into four main levels of maturity:

## Ad-hoc



### Capability score below 40%

Where proposal development really is slightly chaotic. In many cases it's still led by the salesperson who's unlucky enough to receive the RFP!

About **31%** of respondents since 2020 fall into this camp.

## Tactical



### Capability score between 40% and 59%

Where bid folks' job is to make life easy for sales by running the process, producing complete and compliant documents. The focus is on efficiency rather than the quality of the document; they're effectively chasing everything that moves, and are often under-resourced.

That accounts for **47%** of the organisations who've complete the PB in the past two years.

## Strategic



### Capability score between 60% and 74%

They've built the right approach to bidding – with great people, a strong process, the right tools and a focus on producing great output. But, you know, it still sometimes feels like a bit of a struggle!

**17%** of organisations fall into this camp.

## Strategic+



### Capability score greater than 75%

The importance of proposals understood from the top of the organisation down, as the growth engine – the job protection and creation engine – for the business.

In the past two years, the number of companies hitting this top tier has more than doubled. Only to a little over **6%**. But still: doubled.



## So how does maturity correlate to win rates?

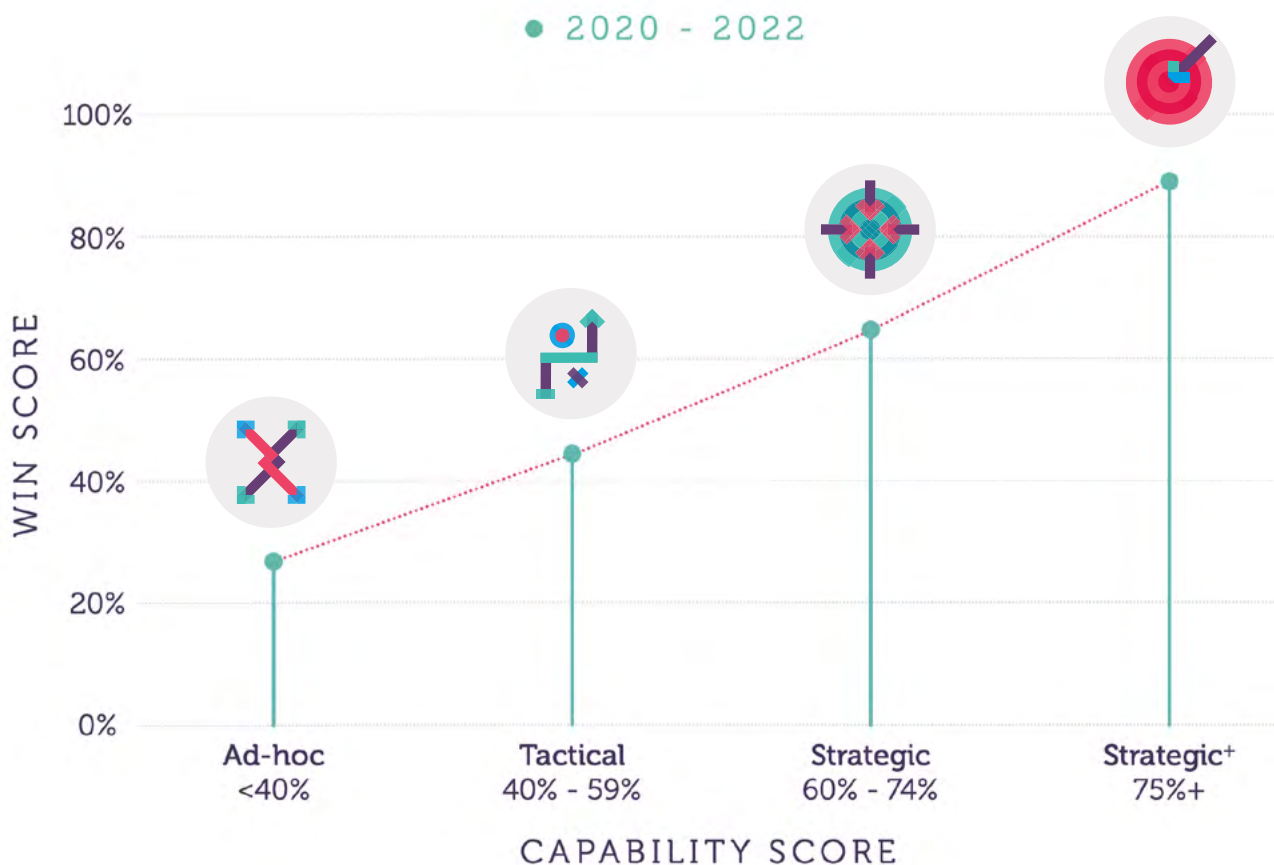
By design, we don't explicitly ask people to share their win rate when completing their Proposal Benchmarker™ assessments. There are simply too many different ways of calculating it to get an apples-for-apples comparison. Of course, client decisions are based on more than simply your proposal and pitch. And we're not sure that folks would actually disclose something so commercially sensitive.

But we built in some questions that together let us mimic win rate, if you like. For example:

- do you win more bids than you lose, and
- do you win a higher proportion of bids than would be expected given your market position?

We add the responses to this sub-set of questions together, to get what we call a "win score". And we can plot the average win score for each of the four levels of maturity.

**So what do you think happens? The data is staggeringly clear. It shows pretty much a straight line: a direct correlation between an organisation's proposal capabilities and its win score.**



And actually if you compare the data from 2017/2019 to the results from the last two years, the strategic+ camp is pulling even further ahead.

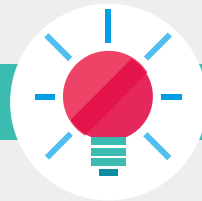
The key conclusion from this is clear:

improved proposal capabilities  
help you win more business.

# How the

Our final piece of deep-dive analysis. We compared the answers from the top 10% of organisations by win score with those of the bottom 25%, looking for statistically significant differences.

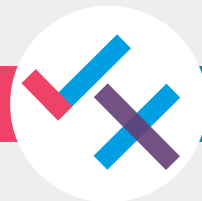
And the data shows a dozen key areas in which the teams who win more outperform the masses. In the most successful organisations, it's far more likely that:



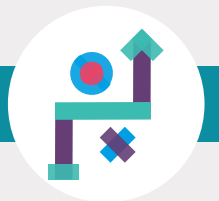
They're stronger at **bid competitive intelligence** (albeit still not strong enough).



Their subject matter experts own the content in their pre-written **content library**.



They have a more robust '**bid / no bid**' process that ensures that we allocate the right resources to the right deals - based on best practice criteria (is it real, do we want it, can we win it, can we do it?). And deals are qualified out until they're qualified in.



They're storytellers, clearly identifying their **proposal strategy** and win themes, and making sure everyone contributing content understands those. They draft the exec summary early, so everyone writing content understands the big picture. And win themes therefore cascade through the whole proposal.

They're **proactive**, not merely working on one RFP response after another. They have a clearly defined approach to pre-proposal planning. They're influencing the client's requirements and criteria on the majority of deals. They have a clear, structured process for renewal proposals – rather than sitting back and waiting for the slippery slope of the competitive re-bid. And they're regularly winning business via proactive proposals, without waiting for an RFP.

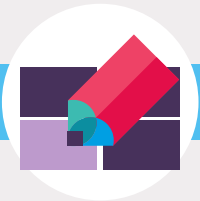


They have a clear **capacity plan** in place, reflecting the resources and skills needed to support the upcoming deals on the sales pipeline – with the level of proposal support provided aligned to the strategic importance of each deal.

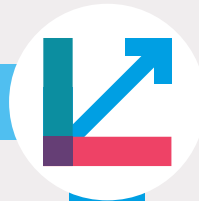
# best win



They have skilled teams of trained, **expert peer reviewers**. (As we always say, being a reviewer should be a badge of honour.)



They're passionate about **storyboarding**, or other forms of content planning, before contributors start to draft content.



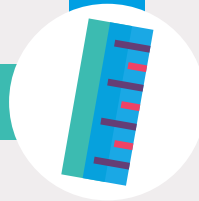
They have a track record of **successfully investing** in their proposal function – and there's a clear and well understood return on investment delivered by the proposal support function. As a result, it's more likely that proposal development is in the **DNA** of their business – and they're way more confident of success on all of the must-win deals in their pipeline.



They run independently facilitated **learning reviews** internally, win or lose – with robust client debriefs too – and lessons learnt drive real change, with ownership from senior management.



All those involved in proposal development have been **trained** – recently – in the necessary skills – with proper analysis of training needs. And that includes specific training for everyone involved in pitching to clients. And their staff tend to be APMP-certified.



They **measure** the **success** of their proposal support function using a clear balanced scorecard that reflects win rates, internal and external feedback, proposal quality audit scores, and other clearly defined criteria.

All this stuff is eminently achievable. If you're not ticking the boxes, perhaps this becomes a blueprint for success, and an agenda for a conversation as soon as possible with the most senior executives in your organisation.

# A peer into the future of benchmarking

We always want the Proposal Benchmarker to be a stretch target for even the best organisations.

So we've recently run a consultation exercise with a number of very senior leaders in the bid and proposal profession, and have captured their ideas on how they see the most successful teams evolving in the next few years.

Their views will be folded into the next release of the Proposal Benchmarker this summer.

Some of the areas we'll start to assess include:



Even tighter response times

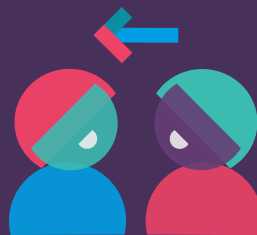
Flexible working and a better life / work balance



Digital delivery



Greater scrutiny up front

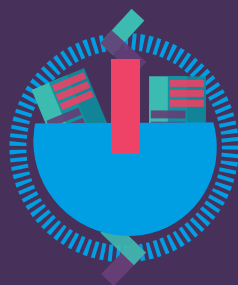


Senior management buy-in



Increasing quality of output design

Sales enablement and automation



Realisation of the importance of the campaign / influencing positioning



# Testing your own capabilities

If at any point, if you want to test your own capabilities, you can head to the Proposal Benchmarker™: [www.proposalbenchmarker.com](http://www.proposalbenchmarker.com)

We also soft-launched another free tool earlier this year. My Proposal Coach is like your own personal benchmark – an individual version of the Proposal Benchmarker! It offers you the chance to rate your personal skills in key areas relevant to your role and comes up with some development recommendations. It's already been used by over 100 people, and we've been getting great feedback.

If you want to have a go: it's at [myproposalcoach.co.uk](http://myproposalcoach.co.uk)



## In conclusion...

The patterns that emerge from the PBM data are clear, and so too is the call to action.

- ✓ **Reflect** on the list of the areas in which most teams are currently successful. If you're doing all of those, you're hitting the baseline. If you're not, you're falling behind.
- ✓ **Ponder** the four key areas where we're struggling as a profession. Are those issues for you? If so, how could you break out of the rut?
- ✓ **Review** the twelve areas in which the organisations who tend to win most outperform those who are struggling with win rates. Pick a few you're not doing, and start a debate internally with your senior executives.

And if you're in the healthcare sector in the Netherlands, you're probably feeling doubly smug having read this, right?

Most importantly, we hope that the 100,000 data points in the model come together to give one clear story. **Be in no doubt: the quality of your approach to proposal development has a huge impact on your organisation's win rates and future success.**

We hope that this white paper has sparked some ideas for you – whether your organisation is still early in developing its proposal capabilities, or whether you're high performers looking to stretch yourselves still further.

**We wish you well on your journey.**

# Strategic Proposals: helping clients to win bids since 1987



**Jon Williams** CPP APMP Fellow FRSA FF.ISP

Managing Director, Strategic Proposals

[jw@strategicproposals.com](mailto:jw@strategicproposals.com)

07813332294



**Graham Ablett** CPP APMP Fellow FF.ISP

Director, Strategic Proposals

[ga@strategicproposals.com](mailto:ga@strategicproposals.com)

07710981754



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