

# Twelve Ways to Win

Challenges for bid and proposal teams

January 2026



Strategic  
Proposals





**“Happy  
birthday  
to us!”**

## **Strategic Proposals’ UK business celebrates the start of our 25th anniversary year in 2026.**

When we opened up shop in 2001, calling what we do a “profession” might have been a stretch. Professions have qualifications, right? Back then, the APMP certification scheme was still a somewhat distant dream. Now, over 18,000 people worldwide have earned at least their APMP Foundation badge (and we’re proud to have helped several thousand of them to have passed!).

Proposal tech? At the time, there were two credible vendors: Pragmatech and Sant. Then they merged. One recent estimate put the current number of vendors in that market at over 250.

Processes? People looked at us as if we were from Mars when we argued that just because an RFP had showed up, you didn’t have to bid. The 2025 APMP / Loopio benchmarking report showed that 83% of organisations now have a qualification process in place.

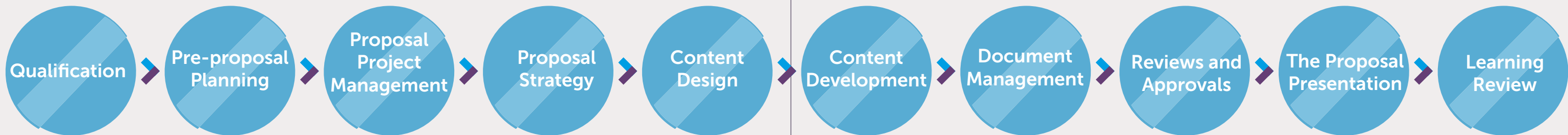
**In almost every regard, we’ve  
been on an incredible journey.**

### **So, where next?**

We spend our lives working with organisations in different sectors around the world. We see what’s working – and what’s not – at close quarters. We’re hugely active in APMP: nine of our current or past team members are Fellows of the Association. And we do extensive primary research with sales, bid and proposal teams.

We’ve distilled all that learning into twelve things we’re seeing the most successful bid and proposal teams doing right now to optimise their win rates and gain competitive advantage.





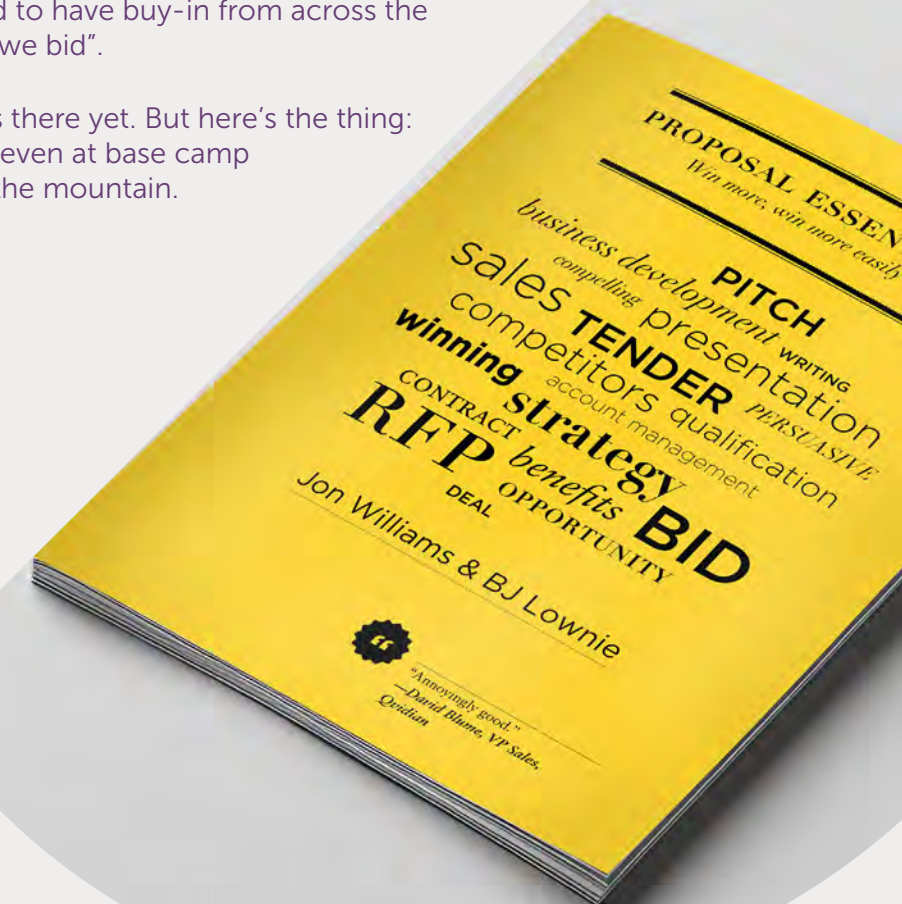
# 1 Robust core processes

Just over a decade ago, we outlined a ten-stage process for creating winning proposals in our book “Proposal Essentials”.

You may have read it! (If not: pop over to Amazon or ask your favourite local independent bookseller to get you a copy. People seem to love it!)

So first on our list of secrets for success in 2026 is the need to have a clearly defined proposal process in place, based on best practice. The need to use that routinely, but nimbly. The need to have checklists and facilitation materials at each stage of the proposal process to support the right conversations. The need to have buy-in from across the business to “this is how we bid”.

Not every organisation’s there yet. But here’s the thing: if you’re not, you’re not even at base camp – never mind climbing the mountain.





## 2 Early engagement

Two questions to consider at the start of this new year

1 Can you list your organisation's top ten must-renew contracts in the next twelve months?

2 Can you list your organisation's top ten must-win new business opportunities?

**If you can't say yes to both, we'd be worried.**

That suggests that your bid and proposal process isn't aligned as closely as it should be with your sales pipeline. Because, actually, you should have known the answers to those questions six or more months ago.

We've talked for a long time in the profession about the disciplines of capture management and pre-proposal planning. Finally, they're becoming integral to the approach of the more successful proposal teams out there.

They've moved from being purely RFP or ITT response factories into engaging far earlier with their sales colleagues. Now they're just as likely to be producing proactive proposals, campaign collateral, renewal proposals and birthday proposals (or "value reports"). They have processes in place for each.

That has a massive impact on win rate – and on the credibility of the bid and proposal function as a trusted partner to sales.



# 3 Active qualification

As we discussed earlier, the overwhelming majority of organisations now have a “bid/no bid” process in place. The goal: that you should never find yourself working on a proposal unless you’re confident you can win and have all the resources needed to do so!

The four-question qualification mantra that SP developed years ago –

“Is it real, do we want it, can we win it, can we do it?”

– is now in the APMP Body of Knowledge. (Or, at least, the first three are – the Association doesn’t seem fussed about whether you can deliver successfully once you’ve won!).

And teams increasingly understand that deals should be “qualified out until they’re qualified in” – that the default setting should be “no bid”.

But it doesn’t always work in practice, does it? Let’s talk about a couple of things that teams are doing to make this really stick.



## First, start early.

We want our proposal to be sown onto fertile ground. So you’ve all probably had this conversation with the sales lead as part of a qualification meeting once an RFP’s arrived: “Do we have a great relationship with the key decision-makers in the client’s organisation?”

“Well...erm...no!”

And by that point it’s too late. The shutters have come down, the client’s into a formal process where you can only make contact by sending emails to [difficultprocurement@gov.uk](mailto:difficultprocurement@gov.uk) or whatever...

But if you have that conversation two, four, six or twelve months before the RFP’s due out? Then those qualification questions stop being merely yes / no ticks in boxes and become a series of prompts that help identify actions to improve your win probability. And that’s a sure-fire way to get salespeople to buy in to the process.

## Second, the need for a “no bid” process.

You have the qualification discussions, the decision’s a “go”, and the cavalry shows up to support the salesperson.

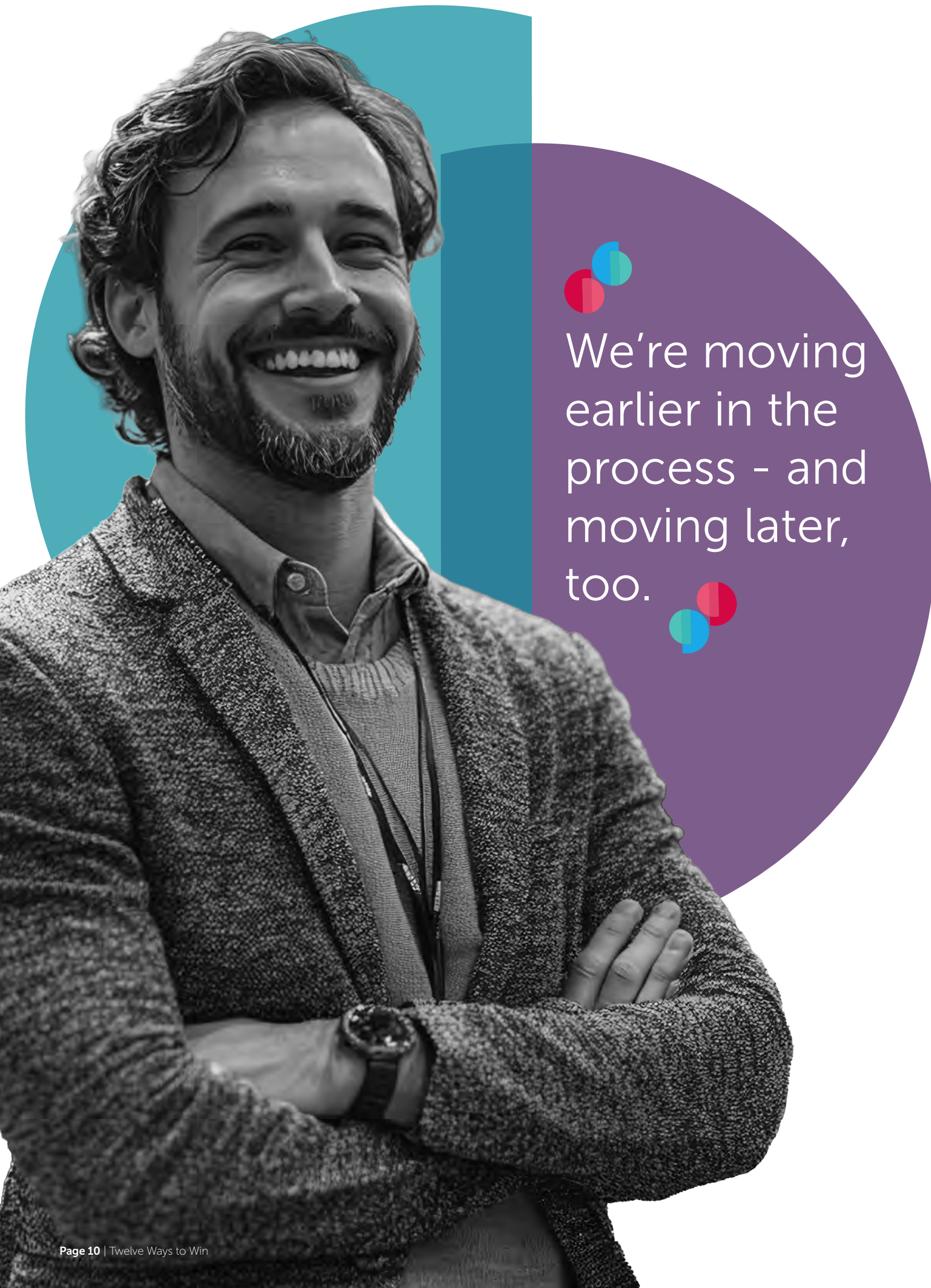
“No go?” And they’re left on their own to work out how to have a potentially tricky conversation with the client – which, invariably, they do badly. “To bid or not to bid?” The former is often the easier option.

### Here’s the trick

Support that “no bid” process. What messages do you need to get over to say “no” this time, in a way that opens doors to future opportunities? Who needs to hear the message? Who’s best to convey it to them? What coaching to they need to have the conversations confidently? What materials do they need to support the discussion?







We're moving  
earlier in the  
process - and  
moving later,  
too.

## 4 Presentation coaches

We incubated Strategic Proposals' UK operation in a procurement consultancy for our first few years, and we like to keep a close eye on what's on the minds of buyers.

And what are they concerned about now? You guessed it: AI. The worry that it's merely a case of "Computer says: proposal" and that the written submissions they receive aren't the output of careful thought, of clever people toiling to design the perfect solution and commercial model for them. It's that they're the result of what an account director said to us during a benchmarking project a little while back: "I turned to my new friend Mr CoPilot and he wrote the proposal for me."

We're therefore seeing a rapidly increasing emphasis on the importance of the proposal presentation. Rather than you being invited in (say) three weeks after submission, once the evaluators have had a chance to evaluate your document, they're asking for the presentation material to be submitted at the same time as the proposal.

The dynamic in the room is changing. It's no longer simply "pitch to us and we'll see what questions come to mind". How ready are your teams for more structured interviews or scenario-based roleplaying?

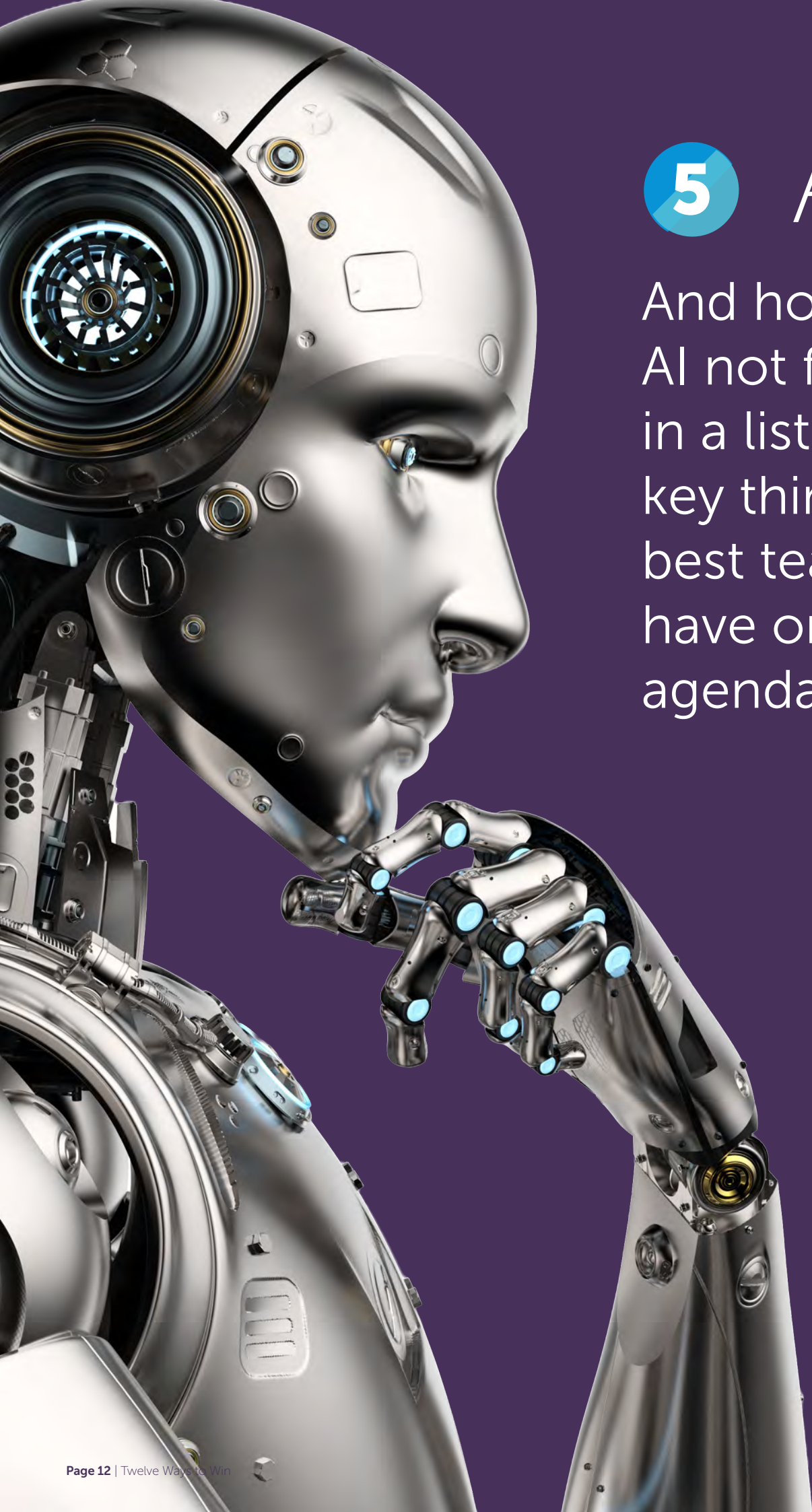
**They're asking you to present much sooner after the proposal's gone in – think days, not weeks.**

And they're putting far more weight on those face-to-face engagements: on one big recent bid, we saw 60% of the total scoring in the evaluation awarded on the face-to-face presentation – rather than on the written proposal.

Proposal professionals need to get even better, even sharper at developing great presentation scripts and collateral, and at coaching presentation teams.







## 5 AI

And how could AI not feature in a list of the key things the best teams have on their agendas?

Some are using AI systemically, strategically, across the bid and proposal lifecycle. They've defined their requirements clearly and engaged the various vendors in the market to source the right solutions. They've deployed (or created) tools and agents. AI's now absolutely and consistently at the heart of how they craft strategies, plans and content.

Others are making more organic, more tactical use of it. Their knowledge management tech now has AI built in to generate answers quickly from their pre-written content, so they're using that. Or they're pointing AI tools at SharePoint. They're getting good at using ChatGPT or Copilot to do research, or help edit content. They're using point solutions like Crystal to understand the customer's decision-makers. But still it's all a bit patchwork, a bit improvised, a bit makeshift.

And then there are those who either can't use AI because their IT department are luddites, their risk managers are too paranoid, or where the bid and proposal folks frankly find it all too confusing and daunting. They've dabbled with Copilot

because it's on their screens - but they don't really use it with any real confidence or skill, and it's not used in any consistent way across the team.

If you haven't got a grip: get a grip. You urgently need to be exploiting AI, rather than being exploited by it. We published a tool to help you in December - click and have a play!

And, of course, content is at the heart of this. When people started talking about AI in the profession three years or so back, the consensus seemed to be that the old disciplines of knowledge management would die. In fact, folks have realised that they're more important than ever before - if you don't want to generate poor proposals at lightning speed!





# 6 Focus on design

Someone described a submission our designers had worked on recently as a “magazine-style” proposal. Erm, no. It’s a proposal-style proposal.

People see what it looks like before they read what it says

...as we’ve long argued. So two things to consider as you think about the role of design in helping you to win more:

## 1. Great design is inarguably part of a great bid process.

It’s about far more than plonking a few graphics amidst your text – it’s about creating a visual identity for your whole bid that creates rapport with the evaluators and differentiates you from the competition.

And even if the client asks for submissions in Excel with no graphics, or an upload to a plain text portal, design will play a part when you get to present – at which point procurement are far less prescriptive about fonts and formats.

## 2. Great design isn’t done by amateurs – or AI.

A session at Bid & Proposal Con in the States two years ago predicted that the end was nigh for the design profession. And, sure, some folks are using AI tools to generate perfectly serviceable designs relatively quickly.

But here’s one generated recently within seconds when we asked for a picture of “audience at a conference for bid management professionals in the UK”:

## Don’t they look smart! Don’t they look male... white...bored!

So we’re not talking here about “perfectly serviceable”: we’re talking about empathetic, differentiated design that helps you win. AI can spark ideas and get you going. But the best design inarguably comes from the best designers.



# 7

## Intelligent competitive intelligence

We all get that the job of the proposal is to clearly articulate: “why us, why not them?”. And we’re doubtless all using tools like a Bidders’ Comparison Matrix to help tease out our strategy.

**Problem is, most of us are basing our conversations about competitors largely on speculation and guesswork.**

We even see organisations who feel uneasy with the whole idea of competitive intelligence (CI). “Why us, why not them?” isn’t playing nice. They’ll get as far as “Why us?” – because “...why not them?” just isn’t the done thing, it’s not cricket. We despair.

Rather than repeat detailed work, let’s take a shortcut here. Have a look at the research report we published last spring, with practical advice on setting up **Bid CI processes**.





## 8 Win / loss research

Core to good CI is the discipline of win / loss.

Do you regularly ask customers for verbal feedback on the proposals you submit?

What proportion of the time do they agree to have that feedback conversation with you when you ask?

**Probably not always, right? And how useful is the feedback if they do share it? Often not very! Buyers giving debriefs are usually on the defensive: they're trying not to give you grounds to challenge their decision.**

And yet there's the adage that feedback is the breakfast of champions (Ken Blanchard). In the past couple of years, we've done a fair bit of work with SCIP – the professional body for competitive intelligence professionals. The one area where their work touches ours is around win / loss analysis.



1

Wait until the dust has settled.

2

Approach a sample of clients who've received proposals from you in the past few months.

3

Get a skilled independent interviewer to have a structured conversation with a contact in the customer's organisation who'd be amenable to giving you honest feedback.

4

Review the learning.

5

And magic happens – in terms of the insights into your own bid and proposal approach, your propositions, and how you stack up versus your competitors on bids.

**You don't have to do it for every bid. But imagine if you could do it for a few a quarter. Better than none at all, right? Those who are trying it are seeing some fascinating results.**





## 9 Training

**Who'd agree with this statement, which our founder BJ Lownie coined years ago:**

"All those involved in proposal development have been trained in the necessary skills"

You can't argue against it, right? There's this strange sense that salespeople or SMEs are born with the innate ability to write brilliant proposals, or that senior execs become brilliant reviewers overnight as soon as they're promoted to "Director". It's simply not like that.

Training is the quickest of quick wins. To quote the band Editors, adapting the famous expression:

Give a dog a bone  
He'll eat for the day  
But teach him how to kill, then...

Training people isn't something that's a nice-to-have. It's fundamental to winning. Otherwise, life as proposal professionals is always going to feel like pushing the proverbial stone uphill against the pressures of people who don't want to engage or don't know how to engage in the right way.

And while classroom training still has a hugely important place – whether delivered online or face-to-face – the most successful teams see it as part of a more holistic approach to skills development. Coaching, buddy systems, ideas forums, gamification...



# 10 Self-development

It seems to be particularly tough for bid and proposal specialists to get buy-in for their own professional development. Conferences are packed with people who had to buy their own admission tickets, fund their own travel or take time off work. It's as if senior executives assume that those of us in the proposal profession absorb the latest best practice by osmosis.

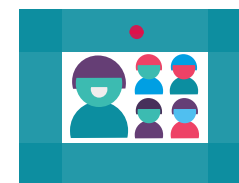
And we know it's not like that. It takes time, work, energy – funding, even. But perhaps we need to look for the low-hanging fruit of cheap, high-impact things we could do to help ourselves. Here are a few suggestions:



Spend time with procurement. The best way to get better at bidding is to understand what it's like on the evaluation side.



Hardly a day goes by without an email from **APMP** promoting one free session or other. Some of them can feel like blatant sales pitches, but there are diamonds in the rough. Listen to what's going on.



Dive into **APMP TV**. There are over 400 hours of material in there, all free for members. Have you watched any? Right: six hours of homework in the next quarter for you!



APMP publishes two big benchmarking reports a year. The next one, in partnership with **Loopio**, will be out in early 2026. Read it. Pick three things it's telling you that your organisation needs to improve. Start the fight to get them changed.



Strategic Proposals published fifteen white papers in the past two years, based on primary research with bid and proposal teams around the world. Who's read them all? We're not the only ones – proposal people love to write. The **Bid Solutions salary survey**, for example, or their brilliant **Bidding Quarterly magazine** (which a few of our directors are proud to contribute to). Next time you pour yourself a glass of wine in the evenings, dive in!



And use some of the free benchmarking tools out there – whether it's our free **Proposal Benchmarker™**, or its newer sibling the **Capture Benchmarker**, or the British Standards Institute **PAS360 code** of practice (for all its many weaknesses), or whatever. Use them to work out how you could push things forward.



# 11 Capacity planning

Would you agree with the following statement: “We often feel like we could do a better job if we had more resources in our proposal function”?

Most proposal teams grow almost accidentally. They appointed a few bid people ten or more years ago. Added some more. Lost some. Grew again. And if we ask, “How do you know you have the right number of people to support your business’s needs?”, we tend to get a shrug.

Here’s a very simplified exercise.

**There are 260 days in the working year.** (Note: we’re not including weekends!)

Let’s say we **allow 40 for bank holidays**, holiday allowance, a couple of days off sick.

**Leaves 220.**

Let’s say we can roll our sleeves up on **proposals for 90%** of that time, after internal meetings and training and the stuff that takes us away from the day job. That leaves us **200 days** (give or take).

$$\begin{array}{ccccccc} \text{(260} & - & 40 & \text{)} & \times & 90\% & = & 200 \\ \text{days in the} & & \text{bank} & & & \text{time on} & & \text{days left} \\ \text{working year} & & \text{holidays} & & & \text{proposals} & & \end{array}$$

$$\begin{array}{ccccccc} 200 & \div & 15 & \times & 6 & = & 78 \\ \text{days} & & \text{days per} & & \text{team members} & & \text{proposals} \\ & & \text{proposal} & & \text{on proposal} & & \text{per year} \end{array}$$

Let’s work the other way. How many days would you want your proposal team to spend per bid to do a fantastic job – from capture and pre-proposal planning through to the proposal presentation and win / loss – including all the disciplines of management, writing and design?

Pick a number. Let’s use **15 days** as an example. So you can do a wonderful job on **200 / 15 = 13 proposals per year per head**. (Unlucky for some?!)

How many in your team are working on proposals – excluding managers, support staff and knowledge base experts? Let’s say six people, for example. So you can support **13 \* 6 = 78 proposals per year**.

And then, top-down: how many bids does your sales team need you to support to hit their targets for business development and renewals – for revenue generation and growth?

We guarantee in that example it’ll be more than 78.

Now it’s more complicated than that, of course. Major bids take longer than more run-rate deals. You’ll probably offer distinct levels of support for some opportunities – our well-proven “Manage – Facilitate – Enable” model. There needs to be some granularity by role. You need to optimise the mix between internal resource and carefully selected external resource to provide specialist or expert input and to help you manage peaks in workload.



But here’s the underlying truth:

Sorting a genuinely great capacity plan, aligned to the business’s needs, and with a clear engagement model showing what support you can offer to which category of deals, is fundamental to getting win rates right.

And our benchmarking data suggests that most bid and proposal teams are desperately under-resourced – even before you factor in that the most common name we see on their org charts is “Vacancy”.



# 12 A strategic function

And then finally, one that's increasingly on the agenda of APMP globally, partly thanks to the recent launch of their **micro-certification** in Strategic Response Management. (Even if that's all wrong – "strategic" and merely "responding" seem inherently contradictory!)

We've long argued that a company's proposal function is its job creation and protection engine. And sharpening proposals and winning more work can have a massive impact on an organisation's financial performance. As a result, your CEO and other senior executives must be not just aware, but passionately supportive, of the work you do.

Over 25 years, we've run lots of change projects that have led to huge win rate improvements. And there's one thing that's consistently true: real change, leading to the maximum benefit, only happens if there's C-suite sponsorship. There have been so many CEOs, Managing Partners, COOs and Chief Commercial Officers who've got excited by this because can see the potential benefits.

**This is a business-critical function. Turning your C-suite into advocates, champions and sponsors is so important and so relatively easy to accomplish.**

## To the next 25 years!

Where have we been in this paper? A little reminiscing. A little crystal ball gazing. And, we hope, a great deal of practical advice. A saunter through a dozen trends: things that the most successful teams out there are doing. Things, perhaps, that your competitors are already doing – that's the scary part!

But these are all things that will ultimately let you win more, win more easily, and flourish in your bid and proposal careers. We wish you every success, as we embark on our second quarter-century here in the UK!

**And if we can help at all, do let us know!**



This white paper is adapted from a presentation given by Strategic Proposals' UK Managing Director **Jon Williams** CPP APMP Fellow at the 2025 APMP UK BIDx® The Big One conference in November.



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