



# THE SALES PROPOSAL PLAYBOOK

A toolkit for winning bids





Proposals are critical to successful selling. Done well, they resonate with the customer, differentiate you from your competition, and position you to win the bid.

Yet many salespeople find writing proposals to be challenging.

**THE GOOD NEWS?  
WINNING CAN BE  
EASY!**

We're going to lead you through seven steps packed with practical, proven tools and tips to help you win more – and win more easily.

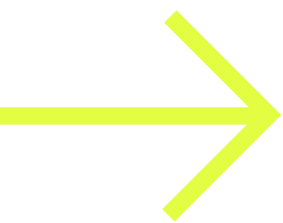
**LET'S PLAY**

- STEP ONE** Decide whether you should bid
- STEP TWO** Plan for success before the RFP lands
- STEP THREE** Tell a story
- STEP FOUR** Plan before you start writing
- STEP FIVE** Write persuasively
- STEP SIX** Get it reviewed
- STEP SEVEN** Review lessons learned
- CONCLUSIONS** The art of winning proposals



# STEP **ONE**

Decide whether  
you **should** bid



# Be ruthless in your “bid / no bid” decisions

Nobody likes losing. And time – yours and that of others in your business – is precious. So the starting point for a good proposal is to make sure you’ve got a strong chance of winning the deal before you even get going!

**Use the four-question “qualification mantra” to help you decide whether this one’s for you:**



## 1. Is it real?

If this is an existing contract – can you clearly articulate their points of dissatisfaction with their existing supplier? Are things so bad that it’s really worth the effort, risk, cost and hassle for them to move? Do you have a solution or price that’s so much better that they simply couldn’t ignore it?

Or are they just going through the motions – to keep their incumbent on their toes, or because their procurement process requires competitive tendering every few years – with no actual intention whatsoever of swapping suppliers?

or

If this is a brand-new project or service, with no incumbent: is it going to fly? Are they clear and realistic about their requirements? Do they have the necessary budget, and a business case? Do they have the resources needed internally to work with you to deliver this – and do they have senior executive sponsorship?

## 2. Do we want it?

Can we make money from this?

Is this in our sweet spot?

Is this a target geography, sector and client?

Is this the sort of client we want to work with?

Are there any conflicts of interest?

## 3. Can we win it?

Do we have a great relationship with the key decision-makers in the customer’s organisation?

Have we got a great story to tell that will convince them to choose us ahead of our competitors?

Can we build a solution that meets (even, exceeds) their requirements?

Have we done similar work successfully for other clients?

Are we in the right ballpark on price?

And do we have the resources needed internally to run a great bid?

## 4. Can we do it?

Are we absolutely confident we can deliver this successfully if we win?

Do we have the resources, technical expertise, senior sponsorship, cashflow and everything else that we’d need?

## Top tips



Treat every deal as **“qualified out until it’s qualified in”**. In too many organisations, the default setting is “bid” unless someone says “stop”. The most successful sales teams turn that around – they don’t chase a deal until they can build a business case for doing so.



Use an **“active qualification”** approach. Work through the mantra as soon as you know about an opportunity. Use it to decide whether the deal’s worth exploring – as well as to identify gaps in your knowledge and actions that could improve your win probability. And then revisit the “bid / no bid” decision once the RFP’s landed, to validate whether or not to keep going.



**“No bid” brilliantly. If this opportunity really isn’t for you, work out how to communicate that really professionally.** Explain why it’s not the best fit with your capabilities; perhaps, establish your approach as a fall-back position; open the door to discussing other upcoming opportunities. “Trusted advisor” is more powerful than “valiant loser”.



What can AI tell you about how successful (or otherwise!) you’ve been on recent bids to similar customers with similar requirements? And can it shed any light on how well the incumbent’s performing?



# “I’ll tell you why you lost if you can tell me why you bid.”

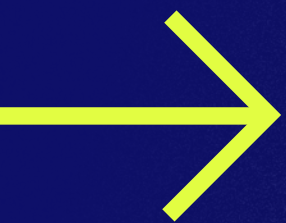
Proposal evaluator, quoted by Hy Silver





# STEP **TWO**

Plan for  
success before  
the RFP lands



# Use a structured approach to pre-proposal planning

Ever found yourself on the back foot in a bid, feeling like you're playing catch-up?

Here are ten things that would ideally be true before the RFP lands. Take control of your own destiny: as soon as you hear about a potential opportunity, grab the checklist and work out what you could do to maximise your chances of winning:

1

We've established a good **relationship** with each of the customer's key decision-makers, and know what good would look like for each of them.

2

We've **influenced** the customer's requirements, criteria and process towards our strengths.

3

We understand the **competitive landscape**. We know who else is bidding and what they're likely to offer. And we know (and have helped to shape) what the customer really thinks of each bidder.

4

We've worked out our likely **strategy, solution and commercial model** – and the customer clearly understands what differentiates us from our competitors.

5

We know **when the RFP will be issued**, and how long we'll be given to respond.

6

We have a clear and realistic **plan** that we're going to follow to pull the proposal together, and any budget that is required has been signed off.

7

We've lined up and **briefed** the people who we expect to involve in our proposal effort, and they've set aside the necessary time to work on it.

8

We've already **started to work on any content** that we think is likely to be needed in our proposal.

9

We've identified any **risks** to submitting a first-class proposal on time, and taken action to mitigate those risks.

10

The client **expects us to win**, and hopes that we'll do so.

**And here's a list of questions for you to weave into your conversations with the customer, before the RFP's issued and the shutters come down. They'll help you to unlock insights that will help you write a proposal that creates real empathy - and to build trust and rapport:**



1. When's your RFP likely to come out and how long are you going to give us to respond?

2. What's the real problem you're trying to solve here or opportunity you're trying to exploit - and what benefits do you expect to deliver? Why would you move away from your current supplier?

3. If I asked you to describe the ideal solution, what would it look like?

4. What do you see as the main risks / challenges for your selected supplier?

5. What budget is in place for implementing the solution?

6. Who'll be bidding against us - and what do you see as our key strengths compared to our competition?

7. What concerns do you have about our ability to deliver this successfully that we'll need to address?

8. If you had to put money on it, who do you think will win - and why?

9. Who's evaluating the proposal and approving the decision?

10. What will be your top five evaluation criteria?

11. Are any external consultants involved in the process - and, if so, what's their role?

12. If you could picture the 'perfect proposal', what would it look like?

## Bonus tips



If you're the incumbent supplier, why are you waiting for an RFP anyway? Seize control of the situation. Months, a year before the contract expires, send them a renewal proposal painting a picture of what you could do for them if they extended the contract - and the benefits they'd achieve. Ideally, you'll stop this getting onto the slippery slope of a competitive rebid. Worst case, you'll impress them - and influence the requirements of their RFP in your favour.



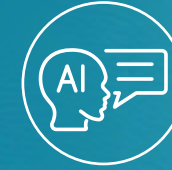
"But we don't hear about the opportunity until the RFP lands!" If you've not been in there influencing the client up-front, someone else will have been. If the RFP lands out of the blue, it's theirs to win, not yours. You can come from behind and write a brilliant proposal - but the odds are already stacked against you. Use these pre-proposal planning techniques before the RFP lands where you can.



"The client won't talk to us before they issue the RFP." Oh yes, they will. Buyers aren't locked away in remote towers like fairytale characters. Some are suspicious of suppliers; some are paranoid about the need to treat every vendor even-handedly. Their views of the art of the possible are shaped by everything they read and hear about the external market. You just need to find ways to get their attention. Because if you don't, a competitor will.



Of course, the written proposal's only one element of the win. Before you even start to plan for the document, build a clear capture plan showing everything that needs to happen during the bid campaign. That may include sending in proactive proposals or white papers to help wire the process in your favour!



There are lots of ways AI can help here. Use Copilot, ChatGPT or LinkedIn Sales Navigator to research the customer and competition, and hence start to think about your proposition and story. (What will each competitor be likely to offer, for example?) Crystal can help you understand what language to use to influence the evaluation team.





# STEP **THREE**

Tell a story



# The art of proposal strategy

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A good proposal tells a compelling story – so before you start to write, work out your proposal strategy. Don't leave it to the evaluators to deduce why to choose you. It's the answer to this simple question:

“Why us, why not them?”

And then frame that in three short, snappy messages (or “win themes”) that you want the readers to remember after they've read your proposal.

You can work that out by considering the “three Cs” of proposal strategy:

## Customer



What's going on in their world right now?



What – and who – is driving this opportunity?



Who are the key stakeholders and decision-makers in their organisation – and what matters to them?



Why are they doing this now? What would be the impact if they didn't do it?



What are their hopes? “Tell me what they want, what they really, really want?” (with apologies to The Spice Girls!)



What are their fears? (What would be the consequences if they chose the wrong supplier, or the supplier didn't deliver what was needed successfully?)

# Capability



What are their top ten requirements? Which of those do we do well, and are there any where we struggle?



## Once upon a time...

Where are they now: what do they have in place? How's it working? What are their pain points?



## ...happily ever after

What will they have in place once we've delivered our solution? What will they be saying about it, and about us? What will be better than what they had before, and how will they measure that?

# Competition



Fill out a Bidders' Comparison Matrix

	Strengths	Weaknesses
Us		
Competitor 1		
Competitor 2		
Competitor 3		



As you do so, work out:

- Are there any gaps in our knowledge that we need to fill?
- How can we emphasise our competitive strengths?
- How can we mitigate / downplay / counter any of our competitive weaknesses?

## Bonus tips



Your win themes should be **individually or collectively unique**. A “me too” story isn’t going to win.



Bring your story to life in a powerful **executive summary** that gets the evaluators on your side quickly.

- Open with some headlines.
- Show you understand what they’re trying to achieve, and what’s needed for success.
- Outline your solution and the value you’ll deliver. Introduce your win themes.
- And show you understand what they’ll need from you next in their process.



What **value** are you going to deliver for the customer? Can you quantify that business benefit and their likely return on investment with headline numbers on e.g. cost savings, revenue increases?



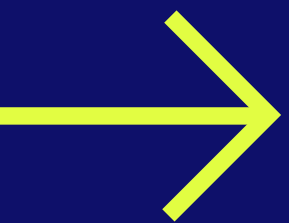
Use AI to compare your strengths and weaknesses against the customer’s key needs and your competitors’ likely offers. Use it to help work out where you can credibly differentiate your organisation from the other bidders.





# STEP **FOUR**

Plan before you  
start writing



Think about what you need to say to make your answers sing!

The temptation when you receive an RFP is just to start typing answers – or simply to use AI to generate your content. (Or, sometimes, to put it to one side for as long as you can get away with, right?!)

The best proposal content is planned before it's written. Take some time to turn the pages of the RFP and make notes about what you need to say in answer to each question.

Use “Questions to answer questions” to spark ideas of what to include in each answer:

## 01

Why have they asked this question?

## 02

What are their real underlying issues and concerns?

## 03

Which member(s) of their evaluation team will be particularly interested in this question?

## 04

How important is this question to them?

## 05

What competitive advantages can we exploit?

## 06

What competitive disadvantages do we need to mitigate?

## 07

Which of our win themes can we bring to life here?

## 08

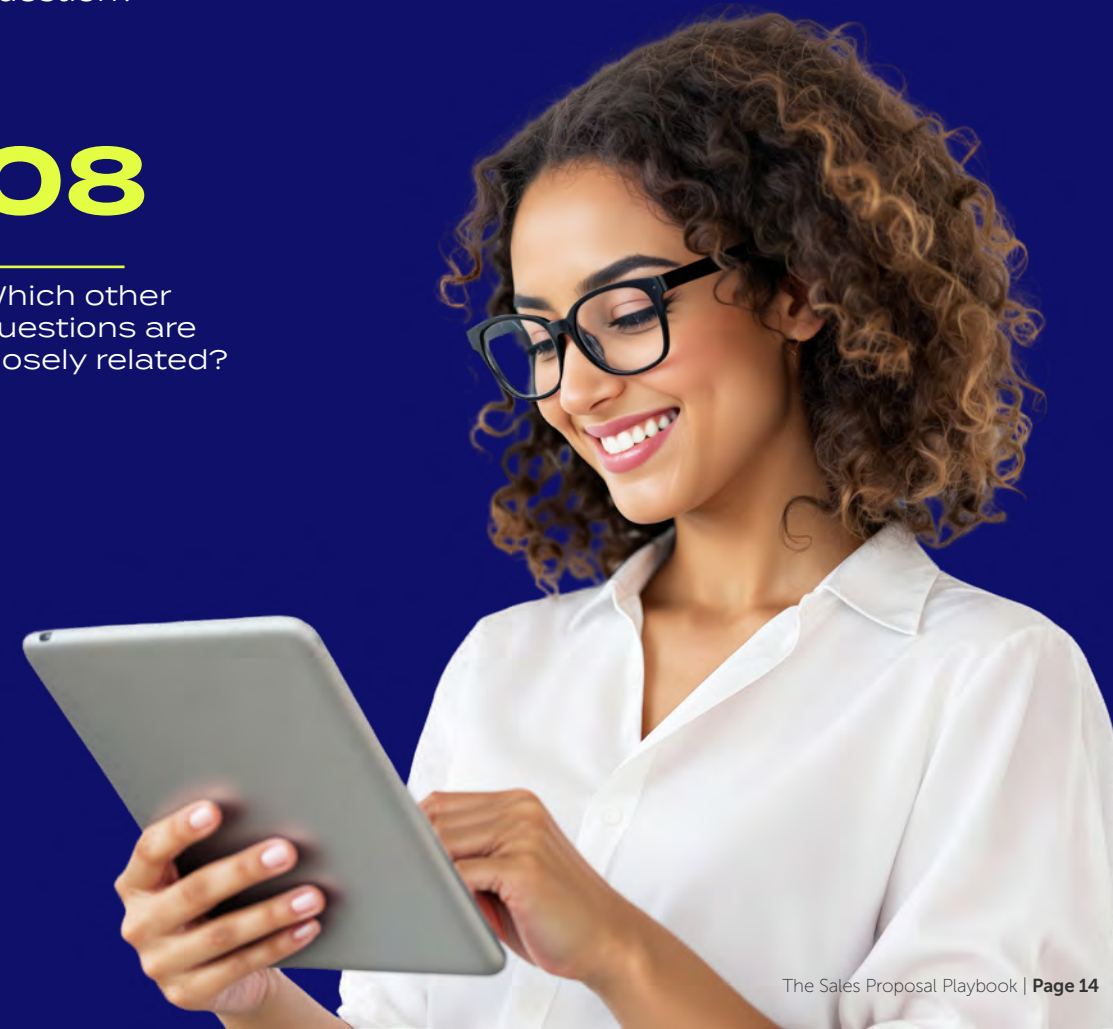
Which other questions are closely related?

## 09

What pre-written content can we adapt?

## 10

If this was the question that mattered, what would we say?



**And write to the scoring system.** If their RFP details how they'll assess your answers, then work out how to tick all of the boxes for a top score. So if, for example, "ten out of ten" requires you to show you'll "exceed requirements", "add value" and "provide innovation" – then make sure you do each of those clearly in your answer.

If they don't publish their criteria, then map out a "three-star" answer. That takes the evaluator beyond "It answers the question, it's workable, it meets our needs and I'm happy with it" to "Wow! They really understand. This is great: they appreciate our issues and aims. There's real innovation and originality here."

For bigger bids or a more complex proposal, with lots of people contributing content, you'll want to build a "storyboard" together outlining what you're going to say in answer to each question. That helps with several things:

- Helping everyone write sooner, faster and better – and saving re-work later in the process.
- Making sure the document hangs together coherently, as contributors know what each other are going to say.
- Thinking about how you'll bring your win themes to life throughout the document.
- Letting you think early on about how you can use graphics to support the written word.
- Allowing senior colleagues to review what you're planning on saying and chip in their good ideas, early in the process.

Here's a simple template for your storyboard:



Question	Map of our answer	Win themes 1 2 3	Graphics	Length	Owner

## Bonus tips



If you have a library of past proposals, or a knowledge base of pre-written content, or a well-prompted AI tool pointing at trusted material, that can quickly get you some text to help with your first draft.

But DON'T just use that verbatim – it won't create empathy with this customer, or real differentiation for this bid.

Start with a plan of what you need to say specifically in this proposal, and then use the system-generated content to get you going.



Think pictures as well as words. Don't just ask "what are we going to say here?" – think "what could we draw?" or "picture the answer for me".



Fix your solution (and, hence, pricing) as early as you possibly can. After all, you can't document it until you've designed it. If you're still debating fundamental aspects of your offer late in the day, that's a sure-fire recipe for risk and stress!



If you're allowed to, feed the RFP (and transcripts of client briefings and any sales calls) into your AI tool to create a word cloud showing what language they're using to describe their issues and requirements. Incorporate these hot buttons into a virtual whiteboard to help with your planning.



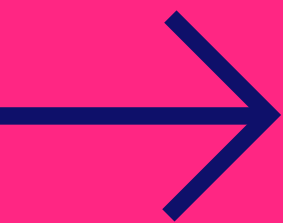
Why not use AI to draft your key competitors' proposals for you? It won't get it right, but it might give you some useful clues as to what they'll say in answer to each question – to help you to focus on how you're differentiating your offer from theirs.





# STEP **FIVE**

Write  
persuasively



A good proposal is a joy to read!

Lots of salespeople are great writers. Yet some struggle to be as eloquent with the written word as they are in person. But there are some simple techniques that make your proposal content more persuasive – and hence improve your evaluation scores.

**1**

### Be customer-centric

Start your answers by talking about the customer's needs, before you explain how you'll solve them.

**2**

### ATFQ

Answer The Full Question. Make sure you answer each element of their question in turn.

**3**

### Prove it!

Readers gain confidence if they see relevant examples of work you've done for other customers – especially if you can include quotes and real data. And think about awards you've won, quotes from the trade press and benchmarking data.

**4**

### What do we do better?

Every answer is an opportunity to steal ahead of the competition in the scoring – and, perhaps, to subtly set traps for them!

**5**

### So what?

Features tell, and benefits sell. Use the “so what?” test on everything you write to make sure you're clear on the benefits to the customer.

**6**

### Tailor any pre-written content

If you're using existing material to get you going, make it feel bespoke to this customer. Mirror their language. Link the content back to this project. Include specific names, dates and locations.

**7**

### Demonstrate momentum

Listing your capabilities or resources isn't enough, unless it's clear how you'll deploy them on this project. Think “who, what, where, when, how”.

**8**

### Use the active voice

Take ownership and be confident. “We'll deliver the project on time”, not “The project will be delivered on time”.

**9**

### Be careful with jargon

Proposals are evaluated by cross-functional teams. Be careful with acronyms and jargon. Be sure that everyone will understand at least the essence of what you're saying.

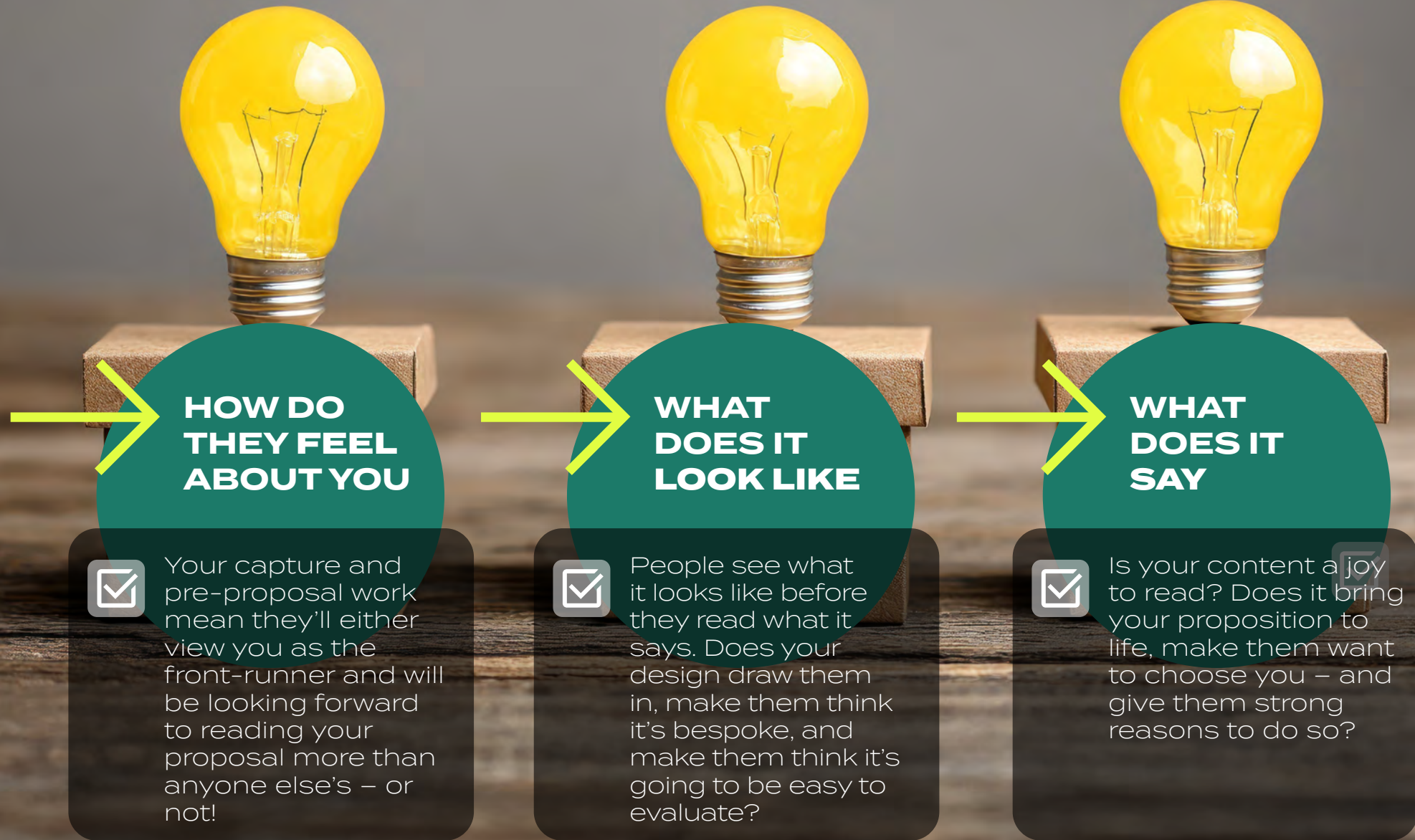
**10**

### Write conversationally

Imagine you're in the room with the customer. They read their question to you, and you read your answer aloud to them. Will it seem warm, friendly, engaging, enthusiastic, professional and with the right level of technical detail?

# Looking good

Think about the evaluator's journey with your document:



Many customers impose constraints on the design of your proposal – typefaces, margins, page limits.

Some even ban you from using graphics altogether. And whatever you do, it's critical that you comply with any such instructions: if you don't, they could use it as an excuse to disqualify you.

But where you do have room to be creative, make your document as visual as possible:

- Colours and designs that will resonate with the customer.
- Relevant photography.
- Great graphics that bring your story to life and make it memorable – after all, a picture paints a thousand words.



**AND REMEMBER:**

like good writing, good graphics should be customer-centric, focused on benefits, and easy to understand.



## Bonus tips



Be concise. The longest proposal rarely wins. As a procurement director once observed flicking through a proposal: “For whose comfort were all these pages?”



You don't need to be a brilliant wordsmith to write persuasive content, or a brilliant designer to make it look great. But if you can get hold of a brilliant wordsmith and a brilliant designer to help, that's great!



As you write, keep your win themes, content plan and the client's scoring system in sight - and check back against them regularly as you write.



AI's great at helping you to “turn a phrase”. Use it to help you refine your language and phrasing. But whatever you do, don't submit a document that's just written by ChatGPT, Copilot or similar. That'll be obvious to the reader; your text will lack authenticity and differentiation: after all, your competitors could be using the same tool!



The content has to resonate with each individual evaluator. Think of this as a “people to people” process, not “business to business” or “business to government”. Will your content and language really work for them?



Another simple AI use case: if you don't feel like typing, use Word's Dictate feature to talk through your ideas - or start a quick Teams call with yourself and let it auto-transcribe your thoughts. It's a fast way to get a rough draft on the page without staring at a blank screen.



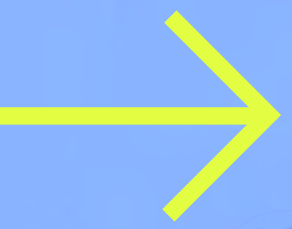
“A great proposal superbly articulates a compelling story.”

BJ LOWNIE CPP APMP Fellow  
Founder, Strategic Proposals



# STEP **SIX**

Get it reviewed



Make sure you're going to win good business!

When you're writing a proposal, it's easy to get too close to the text you've produced – and to stop seeing the wood from the trees. Build in time to give a well-advanced draft to colleagues to look over. Ask them to make specific, prioritised suggestions as to how the content could be improved.

Here are some golden rules for effective reviews:



Find the people you trust to give you wise counsel.



Brief them about the opportunity – particularly, the customer's needs, your relationship with them, and the competitive landscape.



Leave enough time to incorporate their recommendations.



Use the customer's scoring system to mark your draft, and work out how you can improve your marks.



Get them to check your story's shining through clearly: do your win themes really come to life?



Ask them what you've missed – not just how to improve what you've written.

**YOU CAN EASILY ADD 20% TO YOUR SCORE IN ANY EVALUATION BY BUILDING IN REVIEWERS' SUGGESTIONS**

– and that's the difference between coming second and winning the deal.



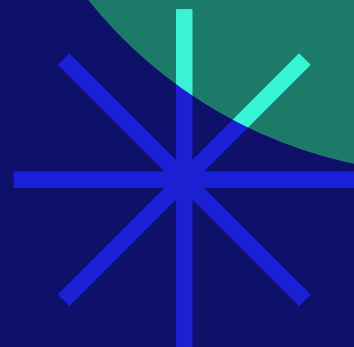
# Governance for the win

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➔ Most organisations have some form of bid governance process – checking everyone’s confident you can deliver this successfully, that the finances feel robust, and that any risks have been identified and you’re comfortable with them.

➔ Make sure you’re following whatever’s expected to get your offer and your proposal signed off by the right people!

➔ But don’t view bid governance as merely a defensive discussion – asking: “Will this be good business for us if we win?” Use it to stay on the offensive, too, by also focusing on “Are we doing enough to win?”



## Bonus tips

“There is always a peer review. It’s just better if it’s done by your company rather than the evaluators!”

Jay Herther APMP Fellow



Don’t give reviewers too much information. The evaluators won’t know your solution and your strategy before they start to read!



Remind reviewers to “play nice”. Occasional comments about what they like about your draft can be really motivating, amidst the constructive recommendations on how it can be improved.



If you’re able to without breaching confidentiality, ask your preferred AI tool to score your draft proposal against the customer’s evaluation criteria. You can use it to get question-by-question improvement suggestions.

You might even want to create different personas (e.g. economic buyer, technical buyer, end-users) and ask it to review the draft against their needs – flagging gaps and opportunities for hyper-personalisation.



Ever worked on a proposal where senior people have thrown in lots of (often conflicting!) suggestions at the last minute? That’s one of the benefits of building a storyboard: you can ask them to feed in any great ideas early in the process, before you start to write, and so take away some of that last-minute stress.



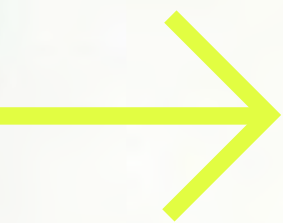
AI can also be great at spotting risks. “Copilot, please tell me any risks you can see in what we’re offering in this proposal” can help you get ahead of the governance process, and make it more robust.





# STEP **SEVEN**

Review lessons  
learned



Share and learn,  
so the next bid is  
even better

Learning reviews on bids used to involve big, complicated workshops. So time-consuming, in fact, that people often never got round to them!

So here are two really simple questions to use at the end of the proposal effort to fast-track learning:

**01**

**What did we do well on this bid that we should do again next time?**

**02**

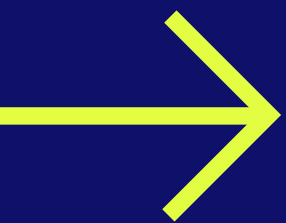
**Perhaps with the benefit of hindsight, what should we do differently on bids like this in future?**



**AND THEN, IF YOU FANCY A THIRD TOPIC:**

What useful information did we pick up? (That could be about this client, their sector, the competition, the market, your propositions...)





# Seek out client feedback

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Some clients will offer you written feedback as part of their procurement process. We understand the temptation to scan it quickly and move on – especially if you lost! But if you do get comments or scores, it's so valuable to analyse what they've told you. That can help you improve your chances of winning next time, let you sharpen your pre-written content, and unlock great competitive intelligence.

If you can get to sit down with the customer to get verbal feedback, that can add even more value. (If they don't offer this – why not ask?) It's important to listen first: they'll have things they're willing to tell you. But here's a list of questions you might want to ask if you get the chance:

**01**

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How did our technical solution compare to the propositions from our competitors?

**02**

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How did our pricing compare to our competitors'?

**03**

---

What did you think of our written proposal compared to the documents from our competitors?

**04**

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What did you think of our presentation compared to others'?

**05**

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Where did we score particularly high or low in your evaluation?

**06**

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What did the eventual winner do that made the difference?

**07**

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How well did we interact with you during the bid process?

**08**

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Did you get to meet the right people from our side – and were there any particular individuals who stood out (for better or for worse!)?

**09**

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What would be the one thing you would advise us to do differently on future bids to you or other prospective customers?

**10**

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Are there any future projects coming up that we might be able to help you with?

## Top tips



Don't let internal learning reviews get personal! We still recoil at the comment from a course participant who'd recently been invited to a "bid witch-hunt meeting". Let's not do that! But if you do want to get individual feedback, again frame this carefully:

- What did I do on this bid that helped you, or helped our chance of winning?
- Is there anything I could've done to help the team more?



Use the feedback. A friend who runs a bid centre once commented: "For us, it's a case of lessons logged not lessons learned!" So share your findings with senior managers, sales colleagues, technical colleagues, proposition owners, marketing... whoever might be able to use them to increase your chances of winning future work.



Don't leave it too late. Customers sometimes take months to decide who's won. So capture learning while it's still fresh in everyone's minds!



Remember, buyers can be quite defensive when they're asked for feedback: they don't want an argument, and they don't want you to challenge their decision. (They may even default to "you lost on price" as a result, even if that isn't true!) Tread gently. Maybe even get someone independent to ask for feedback?



Carry out learning reviews whether you win or lose. Too many lessons learned processes end up being depressing inquests: if anything, it's more powerful to learn why you won than why you lost!



Use AI to analyse feedback to identify which proposal content was new and high scoring. That can really help to fine-tune your content library. And use it to spot patterns and trends over time: how did the feedback on this proposal compare to what you've heard on other recent efforts?





# Conclusions

The art of  
winning  
proposals



“The job of the proposal is to make it overwhelmingly inevitable that I should choose you!”

Steve Mullins  
Fellow, Chartered Institute  
of Procurement and Supply



There's more to winning a bid than just writing a great proposal, of course.

We've not talked in this playbook about how you identify opportunities, build great relationships with clients, manage the overall capture process, bring your story to life in a great presentation, or negotiate the final details of the deal!

But evidence shows that there's a direct correlation between improving the quality of your written proposals and win rates. Easy tweaks to your process can pay huge dividends.



Choose your battles: don't waste time on bids you're never going to win!



Think about how you can build momentum behind your proposal and get onto the inside track before the RFP lands.



Work out the story you need to tell to catch the evaluators' imagination and beat the competition – and how you're going to bring that to life in every section and answer, in a way that will get you top marks in their evaluation.



Write with passion and flair.



Make the document look great.



Build in time to fine-tune your content with suggestions from colleagues, and make sure it's been signed off by the right people.



Learn from each experience, to further improve your chances of winning next time around.



We wish you every success with your next proposal, confident in the knowledge that the tips in this playbook will help you to win!

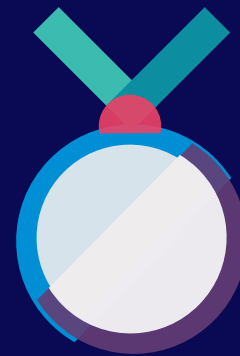


# How we know what we're talking about!

Worked  
with sales  
teams



in over  
**40**  
countries



Trained over  
**20,000**  
salespeople in bidding  
best practices

Nearly



**40** years' experience  
helping clients to  
win work

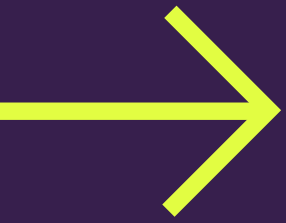
**Outstanding**  
win rates



Recognised  
for pioneering  
research into  
how teams  
win

Winners of numerous  
industry awards





Proposals are a critical part of a sales process, yet too many salespeople find them daunting.

This playbook provides practical, proven tips at every stage of the proposal process to help write great proposals that improve win rates and to take away some of the stress in the process.

It draws on years of experience of helping salespeople to win bids – with tips for using AI to help along the way.



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