

# The Proposal Happiness Toolkit

The **Proposal Happiness Index research** unlocked lots of ideas for how companies can systemically fix some of the underlying problems that lead to wellbeing issues.

This PDF lets you see how your organization is doing in each area of this "happiness toolkit". Have a quick look at it yourself. Or share it with others on your team. Maybe use it to strike up a conversation in a team meeting?:

## Right roles, right people

Expecting one person to be strategist, writer, project manager, designer, and pricer? That's not sustainable. Take time to define roles, structure the team around complementary strengths, and educate the business on what it really takes to win.

Notes:

Rating:



## A clear engagement model

Is it clear how sales and pursuit teams should engage with you? A "just throw it over the fence" approach only fuels frustration. Even a simple service level agreement can clarify expectations and reduce friction.

Notes:

Rating:



## Early engagement that sets the tone

Too often, work starts once the RFP drops - but the real difference is made upstream. When capture and proposals work hand-in-hand, teams move from reactive to proactive - and that's where win rates rise.

Notes:

Rating:



## Smarter qualification

Saying no to low-chance deals is a game-changer. It frees up time, protects morale, and boosts win rates. Yes, it can be politically sensitive - but when you show the data, stakeholders get it.

Notes:

Rating:



## Training that drives empathy

Everyone involved in proposals - not just bid teams, but also salespeople, SMEs and senior leaders. Good training creates buy-in, builds empathy, and helps people appreciate what good looks like. When people know better, they do better.

Notes:

Rating:



## Celebrate more

We're not always great at shouting about success - but we should be. Wins, great feedback, process improvements: these are worth spotlighting. Get visible. Remind people what you make possible.

Notes:

Rating:



## Capacity planning that makes the case

How many bids do you do? How much time does each one take? Do the math. If your team's stretched too thin, use that evidence to start a conversation - and to challenge unrealistic assumptions.

Notes:

Rating:



## Resources and tech that reduce friction

Still hunting down content? It's time to invest in smarter knowledge management - and consider where AI can safely accelerate quality and consistency.

Notes:

Rating:



## Benchmarking to make the case

Senior leaders often need a wake-up call. Whether it's a quick report from a tool like our Proposal Benchmarker™ or a more in-depth independent review, external benchmarking gives you the evidence to influence change.

Notes:

Rating:



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

