

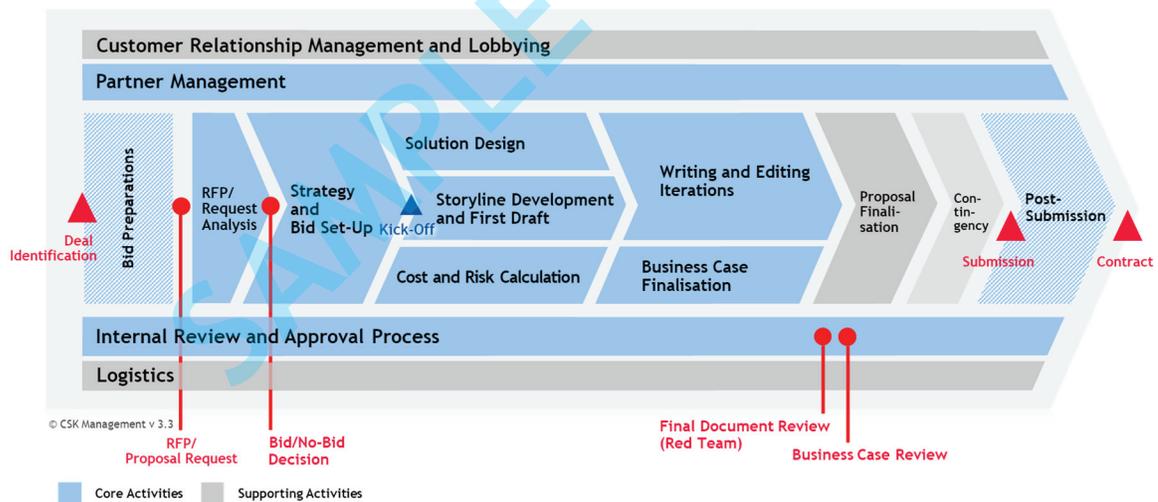
A successful bid management process is much more than just a sequence of internal approvals. The finer details of the internal approval steps are not primarily critical for the success of a bid submission. Much more important are how the bid team approaches their work within the process, and the quality they achieve, so that in the end a winning proposal can be submitted. The *BidMaster Framework™* features a clear overview of all significant work packages. It's full of proven best practices so you can select, modify and use the topics relevant to you in a way that will make your everyday bid management work more successful.

Companies use various internal approval guidelines to review technical and commercial risks. As a reminder: proposal development is a significant part of the sales or business development process. The main purpose of a proposal document is to sell your products or services! That's why the typical approval process, as has been well established in many organisations, is not nearly far-reaching enough.

The BidMaster Framework™: Bid and Proposal Management All in One

There are consistent basic elements that are always found in larger proposals. CSK has summarised these schematically in the BidMaster Framework™ (see Figure III-1). As the various approval points in particular are summarised in a block, the BidMaster Framework™ essentially 'fits' any organisation. These apply regardless of product, service, company size and organisational structure.

Figure III-1 The BidMaster-Framework™ includes all significant work packages in comprehensive bids.



Source: CSK Management

The BidMaster Framework™ consists of the following components/work packages:

1. Bid preparations:
Before the request for proposal (RFP) or tender is received
2. The RFP has been received. Let's go!
3. RFP/request analysis
4. Bid qualification or the bid/no-bid decision
5. Proposal strategy and bid set-up:
 - Setting up your team
 - Defining the optimal document structure
 - Planning the proposal process
 - Establishing your target price
 - Building the four pillars of your proposal strategy
 - Drafting your storyline
 - Structuring the business case
 - Drafting the executive summary
 - Setting up file storage
 - Preparing and implementing kick-off
6. Solution design
7. Storyline and first document draft
8. Cost and risk calculation
9. Text and graphics (including translations, proofreading, editing, formatting)
10. Business case finalisation
11. The red team review (also called the 'final document review' or 'document readiness review')
12. Business case review (also known as the 'gold review' or '(senior) management review')
13. Proposal finalisation (creating PDFs, printing, binding, hole punching, folders etc.)
14. Submitting the proposal
15. Post-submission:
 - Subsequent requests and clarifications
 - Proposal presentation
 - BAFO (best and final offer)
 - Contractual negotiations
16. Maintaining the customer relationship and lobbying during the proposal process
17. Partner management
18. Logistics (version review, IT etc.)
19. Managing the bid process
20. Lessons learned
21. Party time!

It goes without saying that not all of your activities will be completed one after another in sequence. You might find that one topic is spread across the whole proposal process. Still, the BidMaster Framework™ contains distinct work packages for clarity. This should make it easy for you to find the activities you're looking for, so you can use this book as a practical reference.

The central idea of the storyline flows through the whole process, so handling it in a separate chapter turned out to be the best option. You can find out all about the Storyline Method™ in Part IV of this compendium.

Process Design: How to Set up Your Process

In principle, you can adopt and adapt the BidMaster Framework™ to suit your organisation. Simply skip the elements not relevant to your particular situation. Then add approval steps that are relevant to you.

However, you will notice that most of the aspects we'll discuss here cannot be squeezed into a process model. It's more the concepts and skills of those involved that take effect here: it is people, with their skills and passion, who can invest their abilities into a convincing and profitable bid. Even the best approval process cannot replace the abilities of an employee. Still, there are a few ground rules for 'good' processes.

Good processes...

- *...are repeatable, scalable and flexible – depending on the size and type of bid.*
As hardly any two opportunities are the same, the proposal process has to be flexible enough that it can be applied to all bid types.
- *...are documented.*
Each company process (and therefore also the bid process) should be clearly and precisely documented. And to make sure that the folder doesn't just languish in a drawer, it should be easy for everyone involved to access at all times. In modern companies, the processes within a process management system are on the intranet for all employees to access. This ensures that nobody can claim after the fact that they didn't know what the process was supposed to be.
- *...have an owner:*
 - The process owner is responsible for continuous adaption and development. The most useless process is one that no longer complies with the latest conditions.
 - The process owner ensures that the process is put into practice and not just left to languish.
 - The process owner is the contact person to whom those involved can turn in the case of any questions or concerns.
 - The process owner is responsible for regularly carrying out training sessions to ensure that everyone involved knows the process (the current version) and can implement it.
- *...are regularly covered in training sessions.*
- *...feature milestones with reviewable input and output.*
- *...feature documented reviews for checks and improvements.*

Best Practice

All activities in the BidMaster Framework™ include best practices. The summary is always shown in a green box with a corresponding icon (see right).



But what is a 'best practice'? In principle, the best practice is always the 'best' approach according to today's standards. Therefore, we have systematically selected and presented the 'best' approaches

for each phase of the process. It's clear that which approach is the 'best' sometimes comes down to a matter of opinion. Most approaches that I describe in this compendium are recognised across many industries and widely accepted. Many approaches also correspond one to one with the methods touted by the APMP (Association of Proposal Management Professionals). Of course, certain things will differ depending on applicable law, industry or culture. If we are aware of such differences, we've made a note of them.

And best practice is often a matter of healthy common sense rather than a complicated science. This is also the case in bid and proposal management. And there are plenty of things that we know but still don't put into practice as we don't think to do so or just don't have the time or inclination. In this case, it makes sense to stop, think about it and pull yourself together. Speaking of which, I've just remembered I should really go to the gym...

And another thing: many people get 'best practice' mixed up with 'common practice'. For example, if practically all companies were using Microsoft® PowerPoint® for their proposal presentations, it would be classed as common practice. Everyone does the same thing because it's within their comfort zones. But the fact that everyone does it this way does not mean that it's the best practice. There are better alternatives to a marathon of slides full of bullet points.

Who Has the Time for That?!

Quite rightly, you might say: if we did everything as laid out here in detail, we'd miss most of our deadlines. Yep. It goes without saying that doing everything perfectly requires a lot of time, which is very often at a premium.

Of course, some activities or approaches are overkill for many bids. Decide for yourself what does and doesn't make sense.

We'll also show you 'shortcuts' in some sections, which you can use to save time or prioritise so you can keep to your submission deadline. We've labelled them accordingly (see right).



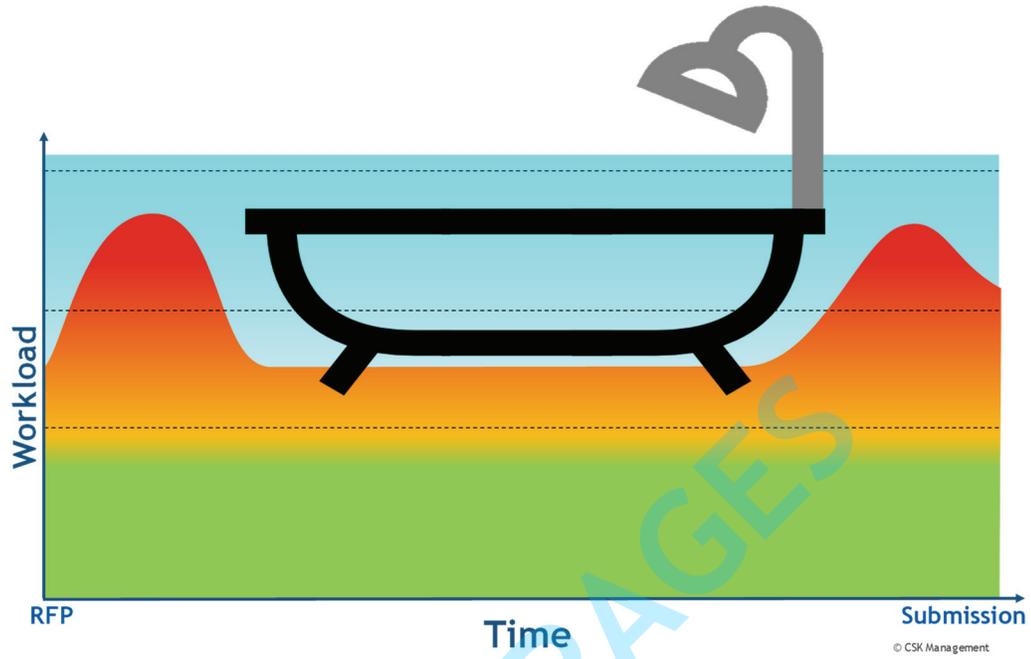
An experienced bid or proposal manager is characterised by having a solid grasp of time management and prioritisation to the extent that they and their team can deliver the best possible proposal in the time available.

The Bathtub

Speaking of time and workload: if you thoroughly plan and draw up the proposal process after you receive the RFP (or if there is no RFP, from the time actual proposal management begins), you'll be confronted with a considerable workload at the beginning. If the whole proposal team gets started at the kick-off meeting, the workload will be reduced but it will get more hectic as the submission date looms. If you were to represent workload in a graph, there would be two peaks: one before the kick-off meeting and one shortly before submission. This looks a little like a bathtub (as depicted in Figure III-2).

If the bathtub is symmetrical, you've probably done everything right, and your planning and preparations were spot on. If the right side of the bathtub is higher than the left, you had a high level of stress and a high workload towards the end. This means that you still have room to optimise your planning and preparations along the time axis.

Figure III-2 The bathtub: the peaks in workload at the beginning and shortly before submission can't really be avoided. But a lopsided bathtub with an extreme peak before submission is not ideal.



Source: CSK Management
