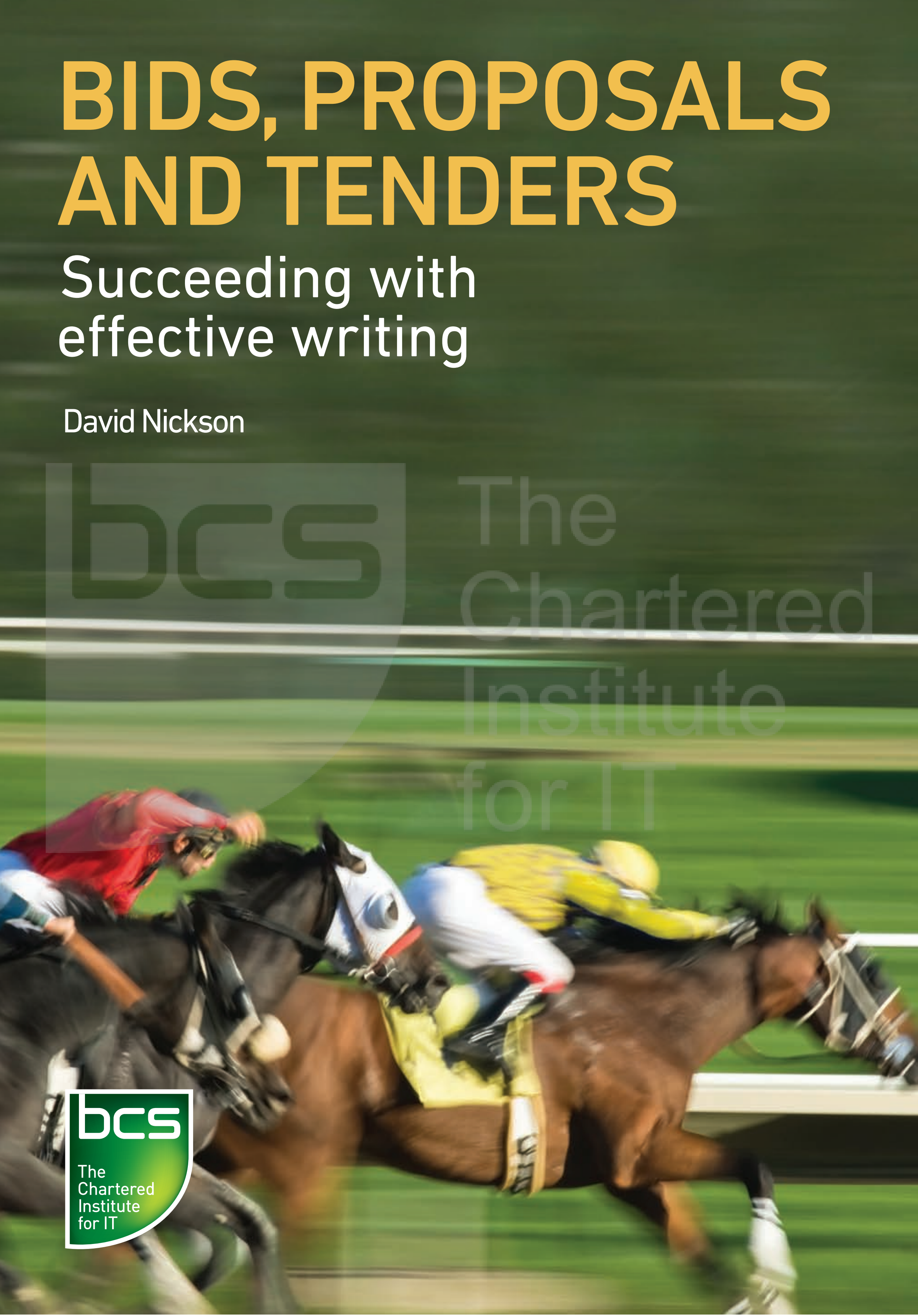
BIDS, PROPOSALS AND TENDERS

Succeeding with effective writing

David Nickson



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For my beloved wife, Suzy, without whom this, and many other books, would never have been written

The Chartered Institute for IT

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AUTHOR

David Nickson has managed, written and reviewed bids for customers in both private and public sectors, including HSBC Bank, the DWP, the Environment Agency, the MoD and the Cabinet Office. He also has extensive experience as a project manager and has over 200 magazine and journal articles to his name along with eight previous books. He is currently Director of Astar Computers Ltd. David is a keen pilot and enthusiastic musician.

FOREWORD

Have you been faced with the daunting task of preparing a proposal? Well, surely it's easy, isn't it? It's only writing your proposition down – you have access to a lot of expertise to help you, so how difficult can it be?

We all appreciate that there is more to writing a bid than this, but do we know exactly how we should go about the task? If there is a straightforward way, then why do we so often end up burning the midnight oil frantically editing responses that have missed the mark or been written poorly, or are inconsistent with the rest of the document – to name but a few of the common problems.

If you recognise any of the situations mentioned above then this book is for you; it is an excellent guide on how to approach proposal writing. If you adopt the methods recommended then you will become more successful with your written proposals.

I have worked with David for several years, and this book describes exactly the approach that he has encouraged me to take with written proposals. What's more, when I have actually taken note, it has made my proposals that much more successful.

Viv Green
Vice President, Application Services
Capgemini

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Suzy Siddons (my wife) for reading and advice.

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And finally, my late cat BeauBeau, the finest 'mews' to set paw on an author's desk.

GLOSSARY OF TENDER TERMS

Note: I have left out entries for UK government departments and so forth, because they change so often. However, that information is readily available on government websites.

Alcatel period A 'cooling off' period of at least 10 days after the notification of an award before the contract is concluded. Allows unsuccessful bidders to challenge the award decision. Named after a pair of linked European Court cases known as the Alcatel case. Formally known as the 'standstill' period.

BAFO Best and final offer.

BEM Business excellence model.

BV Best value.

CIPS Chartered Institute of Purchasing and Supply.

Competitive Dialogue An interactive EU procurement procedure (see Chapter 8) for developing complex solutions.

CPC Central product classification (codes).

CPV Common procurement vocabulary (codes) – part of a package of measures specially developed by the EU to simplify and modernise EU procurement. EU buyers must use CPV codes under EU directives.

CSR Corporate social responsibility.

ECJ European Court of Justice.

EEC European Economic Community.

EFQM European Foundation for Quality Management.

ELTON Electronic tendering online.

EOI Expression of interest.

e-Tendering A process conducted online: supplier registration or expression of interest; contract download; submission of bid document, etc. Can include e-auctions. There are various software platforms in use for this.

EU European Union.

EU thresholds Financial limits based on estimated value of a contract over its entire lifetime. Where the value of a contract is expected to exceed the relevant threshold, it must be advertised in the OJEU.

Framework agreement An arrangement between buyer and suppliers on the terms of future dealings between them, without committing to or guaranteeing any volume of business.

GATT General Agreement on Tariffs and Trade.

G-Cat Government IT Catalogue.

Goods Physical products provided by a supplier.

HR Human resources.

IIP Investors in People.

IPF Institute of Public Finance.

ISDS Invitation to submit detailed solutions – forms part of a competitive dialogue procurement. Defines the solution after it has been refined during the dialogue. Usually preceded earlier in the dialogue by an ISOS – these are both significant documents in terms of the work involved.

ISO International Organization for Standardization.

ISOP Invitation to submit outline proposals.

ISOS Invitation to submit outline solution. Issued during the competitive dialogue process, requiring the bidders to define their proposed solution.

ITN Invitation to negotiate.

ITSFB Invitation to submit final bids.

ITSFT Invitation to submit final tender. An invitation to remaining bidders in the competitive dialogue procedure to submit their final bids at the end of the dialogue.

ITPD Invitation to participate in dialogue. A document inviting bidders in the negotiated procedure to participate in a negotiation process and setting out the terms applying to that process.

ITT Invitation to tender. Shortlisted suppliers invited to tender their services through a formal response evaluated against specific criteria (e.g KPI).

KPI Key performance indicator. Important (set of) measures by which the client will assess a bid (and possibly ongoing service delivery).

MEAT Most economically advantageous tender.

MSP Managed service provider.

NAO National Audit Office.

NDA Non-disclosure agreement.

NGO Non-governmental organisation.

NIPRO Nomenclature of industrial products – codes.

NSV National supplier vocabulary – codes.

OGC Office of Government Commerce (part of the Cabinet Office).

OGCbs OGC buying solutions.

OJEU *Official Journal of the European Union* (formerly OJEC), an online publication publishing contract opportunities with values over specified EU thresholds.

PASA Purchasing and Supply Agency.

PFI Private finance initiative.

PIN Periodic indicative notice or prior information notice.

PPP Public private partnership.

PQQ Pre-qualification questionnaire. First step in the 'restricted' tender procedure used by public-sector bodies to shortlist eligible suppliers.

PSA Preferred supplier agreement.

PSL Preferred supplier list.

RFI Request for information; client requests general information from suppliers – similar to PQQ.

RFP Request for proposal.

RFT Request for tender.

S-Cat Services catalogue (public sector).

Services e.g. IT support, accounting, business processes, etc.

SLA Service level agreement.

SME Small or medium-sized enterprise (may also be used to stand for subject-matter expert).

Standstill period A period of at least 10 days after contract award notification before the contract is made final – allows time for appeal by unsuccessful bidders. Also known as the Alcatel period.

Sustainable development How the service can be shown to meet various employment, environmental and related criteria, and thus to be 'sustainable'.

Tender Bid or offer to supply the goods or services.

TUPE Transfer of undertakings (protection of employment) – a significant cost driver in outsourcing proposals.

TURER Transfer of undertakings (retention of employment rights).

Variant bid A bid which is different from that specifically asked for in the tender documents. Examples include different pricing structures, or innovative ways of working.

Works Typically used in construction bids (e.g. resurfacing a road).

1 INTRODUCTION

When a man is trying to sell you something, don't imagine he is always that polite.
Edgar Watson Howe

I have been writing, editing, reviewing and managing bids, proposals and tenders for a long time, with a success rate that has improved with experience. A common theme over the years is that people whose main job is not writing for proposals (or even those whose main job does not involve much writing for non-specialists) find it hard to do. The goal of this book is to make it easier for them. A spin-off benefit is that people evaluating the resultant proposals, the audience, will have a better, more productive time, too.

That there might be a need for such a book was illustrated by an experience I had a few years ago.

CASE STUDY: UNIQUE PERCEIVED BENEFIT

A few years ago I was working as a bid consultant, reviewing responses by technical experts responding to an invitation to tender for a large Government IT outsourcing contract. As usual, using a combination of tracked changes and review comments I made various points about the quality of the drafts, in terms of the English used, whether the question had been answered, and whether the document showed how the client would benefit. One of the authors, we'll call her CB, phoned to ask why I had made so many comments. Was she doing anything wrong (and what made me an expert)?

We had a long chat, and she said: 'I can see what you mean.' Nobody had ever told her anything like that in the past; she had just been left to get on with drafting responses that were sent up, as they were, to the client. There was nothing wrong with her technical knowledge, or her grasp of English, but thinking of what she was writing in terms of benefits to the reader (the audience) and structuring it so that it was easy for the reader to see that the question had been answered were new ideas. The improvement in the quality of the responses for a relatively small amount of review effort was impressive.

The key point is that writing for bids is not hard, but it may be a different way of writing and expressing material for many specialists, and requires at least a nudge. CB is now a first-rate bid writer – a double-edged sword, since she would sometimes like to spend less time in that role. Despite that, we have stayed friends ever since – a bonus for me.

DEFINITIONS

There are numerous special words, acronyms and phrases used in the procurement world. Indeed, the alphabet soup used in European Union circles is a subject in its own right. That said, the words that seem to crop up most often are **bid**, **tender** and **proposal**. A small amount of research produced the following extracts from various dictionary definitions (including those in the *Shorter Oxford English Dictionary*). I have omitted historical information on usage, specialist dictionary notation and irrelevant definitions (for example, proposals of marriage).

> **Bid.** Ask, entreat, demand, proclaim, the offer of a price.
>
> **Proposal.** The act of proposing something to be done, an offer to do something, an offer of tender.
>
> **Tender.** An act of tendering, a formal offer duly made by one party to another, an offer made in writing by one party to another (frequently to a public body) at an inclusive price or uniform rate, an order for the supply or purchase of goods.

Although they are different in detail, and for different procurement organisations and processes these same words can have different meanings, from my point of view bids, proposals and tenders are much the same. This is why the three are often used interchangeably and why they are constantly defined and redefined within procurement methods and laws. It is also why the title of this book uses all three.

My working definition is: ‘a written submission in support of a sales proposition’. In other words, it is what you write to persuade people or organisations to agree to do something you want done.

WHO THIS BOOK IS FOR

This book is designed to meet the needs of three groups of readers:

- subject matter experts, or professionals who have to write or contribute to proposals;
- bid, technical, sales and project managers who find themselves having to edit material that makes up a proposal;
- technical or professional authors who have to create proposal content from information supplied by specialists and experts.

Inevitably this means that some of the material will seem too easy in some sections and too hard in others for the various audiences. To help with this the chapters have been structured so that they map on to the different groups as far as possible. That doesn’t mean that the reader should just ignore the chapters that don’t seem immediately relevant – I have never stopped learning, and I suspect that others may find hints and tips in areas where they consider themselves expert.

The primary goal of this book is to enable the reader to write effective copy more easily and with a higher probability of success.

HOW IT HAS BEEN WRITTEN

There is always going to be balancing act between completeness and usability. No apology is made for erring on the side of the fast read; if you are reading this book because you want help with writing a proposal then you are almost certainly short of time.

Much use has been made of mini case studies and quotes from specialists and non-specialists who have real-world experience writing and producing proposals. This serves both to bring the book alive and to prove to the reader that, whatever problems they may be having, others have gone before and lived to tell the tale. This is both a 'can do' and a 'how to do', hands-on book.

A guiding principle has been the use of 'plain English' and simplicity, though the nature of the subject matter can make this hard at times; it is difficult to avoid procurement acronyms and jargon in some places.

KEY POINT

A significant challenge for the author was to write for an audience of both proposal specialists and non-specialists without leaving either feeling uncatered for.

WHAT IT DOESN'T INCLUDE

Although the book deals with the logistics of editing and reviewing proposals and managing writing work, there are two areas that are considered to be outside its scope. The first of these is financial modelling (i.e. costing and pricing), though the presentation of financial information is covered. The second is bid management. Covering those would have made this into a general bid management or sales support book rather than one about writing. In the resources section at the end I have included some relevant titles for further reading on these topics, including, of course, my own book on bid management.

KEY POINT

The topic of contributing to legal schedules is touched upon with some helpful do/don't hints but the specialist legal knowledge side of these is also left for suitable specialist books.

HOW TO USE THIS BOOK

The book is designed to be used in two ways. Firstly you can read it from cover to cover and get a good understanding of all that is involved in writing, editing and producing sales proposals. Secondly you can just read a chapter at a time, dipping in and out of particular subject areas depending on your needs at the time.

CHAPTER SUMMARIES

1 Introduction

A brief introduction to concepts and the scope of this book. Definitions of bids, tenders and proposals. What the book is about, target audience, scope, goals and so forth.

2 What is a proposal?

Background information and useful pointers on the role of a proposal. This includes:

- what proposals are for, why we do them, and why they are hard to do;
- a description of the typical lifecycle of a proposal;
- different types of procurements and how this affects writing them;
- who should write such documents, and the concerns of authors, sales and bid specialists when producing them;
- an overview of how bids and proposals are run.

3 Preparing to write

Background information, including:

- the communication cycle and how it affects the way written information is processed;
- basic guidance, such as Orwell's rules, on writing and grammar.

4 Proposal writing

The core material for this book's intended audience – the heart of the book. Topics include:

- sales themes and straplines;
- the use of style and writing guides, and considering the audience;
- how to write, edit and produce sales-related documents;
- benefits versus features, editing and best practice – win bids with EASE (Effectiveness = Audience, Simplicity, Evidence);
- making it easy for the assessor or reader;
- presenting financial information;
- precis;
- executive summaries;
- technical and solution overview summaries;

- writing technical content for non-technical audiences;
- CVs and case studies;
- legal considerations, e.g. use of 'ensure' and 'includes'.

5 Getting information from experts

A chapter for those dealing with others who may not have the time or skills to write themselves, but whose answers must be turned into proposal copy. It includes:

- interviewing techniques;
- different methods for getting information including brainstorming, workshops, straw man proposals, surveys and so on.

6 Editing and reviewing

A chapter for people who are not professional writers or editors themselves but who have to edit or review other people's material. Help with revising material from other specialists or staff who have different areas of expertise. Includes:

- use of technology for collaboration, reviewing and sharing documents, e.g. SharePoint, Huddle and similar systems;
- administrative considerations such as document control;
- editing material to supporting presentations.

7 Supplier and client culture

Effects of the cultures of both supplier and customer on the style, content and presentation of the proposal. Covers:

- how to assess company or corporate norms and how this might change the way you write;
- examples from the public and private sectors;
- checklists to help you determine organisational culture.

8 OJEU proposals

A specialist chapter for the public-sector market within the UK and Europe. Points to consider when writing proposals in the OJEC/OJEU procurement system – guidelines, rules etc. Provides:

- overview of the various lifecycles for OJEU procurements, how they may affect authors and what you might have to write and go thorough to support such a bid;
- introduction to the OJEU process and the alphabet soup of documents, requirements and their purposes;
- an example procurement timeline.

9 Presentation and format

A nuts and bolts chapter relating to the physical (electronic or paper) end result – although many authors are spared this, it is helpful to understand why those at the end of the process get upset when you scramble the format of the template you were given at the start. Covers:

- editing and reviewing your own and other people's material;
- more on grammar, abbreviations and so on;
- administrative considerations such as document naming;
- supporting presentations;
- use of technology for collaboration and for reviewing and sharing documents;
- a checklist for editing.

Resources

A glossary of proposal terms is given at the front of the book. The bibliography lists books, organisations and sources of help including internet links. At the end of the book are standalone versions of selected checklists for ease of use, and an Appendix gives sample designs for proposal documents.

2 WHAT IS A PROPOSAL?

Any project sold by a professional sales team and purchased by a professional procurement team will have a combination of price, performance and timetable that is impossible to achieve.
Nickson's Corollary

AT A GLANCE

- what proposals are for;
- why we make them;
- why they can be hard to prepare;
- their lifecycle, context, methods and management.

INTRODUCTION

At the risk of being thought lazy I'll reuse part of the dictionary definition of a proposal given in the introduction to this book:

> An act of tendering, a formal offer duly made by one party to another, an offer made in writing by one party to another (frequently to a public body) at an inclusive price or uniform rate, an order for the supply or purchase of goods …

In other words, it is an exchange that is, hopefully, beneficial to both sides of the deal. The purpose of this chapter is to expand upon that a little and thus to introduce a few of the more subtle (and not-so-subtle) aspects of what is involved in submitting a proposal.

What are they for?

Proposals have two primary functions:

- to define the offer and the reward for supplying it – what is being delivered and how much it will cost;
- to persuade the recipients that they want to accept the offer – this is the selling part.

Put simply, the functions are to **define** and to **persuade**.

CASE STUDY: DEFINING

Company B had an unpleasant experience. It had successfully offered to supply and install a number of desktop computers for a fixed price to a UK-wide travel business. Essentially the job was to install preconfigured systems, with both normal PC office applications and the client's own reservation and information system, in all of its offices. This would have been fine but for two issues. First, a couple of the offices were not on the UK mainland, so delivery and access to them generated some additional costs. More significantly, on installation Company B was expected to demonstrate that the client application worked. It was this latter point that caused the real problems. The central server for the customer's applications was only available to support testing remote installations outside normal business hours, so much of the installation work had to be done out of normal hours, incurring overtime costs. The company learnt a hard lesson from this: make sure that you fully specify in your proposal what you are delivering when, and what you need from the client in order to do that. They were very careful to do this in future bids, and, where it could not be done, stated that prices were subject to verification when the information needed became available.

KEY POINT

Proposals can often end up being part of the contract. This is never an easy or comfortable situation, since the language used in sales proposals is often unsuited to legal interpretation. Chapter 3 gives some suggestions on the wording to use in such cases.

Why do we make them?

The simple answer is: because we want to do a deal. This covers a wide range of situations and a wide variation in the amount of effort needed to complete the task. Proposals range from simple product quotations – where there might be a specification sheet, a price and a set of terms and conditions – up to huge solution, service and construction proposals that can run into several volumes. Those for complex military solution procurements covering equipment, training, support, maintenance and many options, such as those for a weapons system, an aircraft or a ship, can be very large indeed, running to several volumes. However, they still have the basic functions of persuading and defining.

Even the simplest quote still actually serves both the functions of a proposal: **define** (terms and conditions, specification and price) and **persuade** (specification).

The more complex the subject matter the more likely it is that technical specialists will have to write the document. Hopefully, the 'define' side of things will come fairly naturally to most specialists, but it is the 'persuade' side that can be more of a challenge.

KEY POINT

To persuade people that your technical solution is the one they want, you have to demonstrate the benefits that it will deliver (see Chapter 4: Fact, feature, benefit). This means thinking about your audience – a recurrent theme of this book.

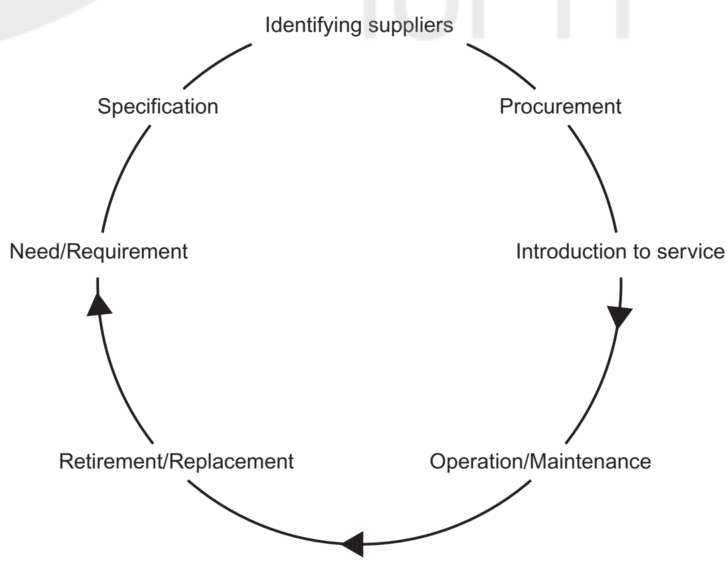
Proposals are not just for commercial propositions, either; they also cover business cases, bids for funding, internal budget applications, requesting a business loan from a bank and so on. The contexts may vary, but the basic elements of definition and persuasion still remain. Proposal writing skills, once gained, have many applications both for your work and your personal life. That said, I do not recommend that you make a marriage proposal on the basis of 'persuade and define' – though I was once told of a suitor who offered to buy his intended elocution lessons if she said 'yes'. She fell off her chair laughing.

CONTEXT

Lifecycle

Figure 2.1 shows my version of a procurement lifecycle. Others exist, but they follow similar basic steps. Not all procurement methods are based on this concept – some consider the procurement to be complete once the goods or services are delivered. That may be neater, but it doesn't encourage a broader view of the process, which should include considerations such as the total cost of ownership (TCO), the overall sustainability of the procurement and its place in the context of the organisation in which it exists.

Figure 2.1 Sales or procurement lifecycle



The sales or procurement lifecycle is not that different from the lifecycles that are found in many project management methods, for example PRINCE 2. This is not surprising, since, when it comes down to it, buying or selling something is a project. For that reason I recommend that anyone struggling with a sales proposal (or a procurement for that matter) takes a step back and applies basic project management skills and tools to the job in hand. If you can manage a project you can manage a proposal, though they are not the same thing.

A project will have deliverables, a budget, a specification and so forth, but these are often negotiable, and the project manager can juggle them to help get the job done. The project is considered to be more successful if it is delivered under budget or early, or to a higher quality.

A proposal, on the other hand, has a fixed timetable and a deliverable that is not negotiable. The goal is to get the proposal out, with the resources available, to the highest quality possible. There are not usually any rewards for coming in under budget or finishing early; the goal is to support the winning of the business. This makes proposals different from projects. It also makes bid managers different from project managers; their expertise is a blend of sales and project management. Not all good project managers are good at managing proposals.

NOTE

For those who look for formal methodologies it is worth noting that the European Information Services Library (ISPL) includes IT services procurement concepts (see the resources in Chapter 11 for a reference to their best practice guide). This methodology considers a procurement to be complete once it passes into service – it does not view it as part of an ongoing product lifecycle. However, it does consider lifetime cost of ownership.

In the case of government and other regulated procurements (see Chapter 8) this cycle may be repeated in a filtering process, where the number of potential suppliers is reduced each time until finally it reaches the last two, who then give their best and final offer (sometimes known as a BAFO). At each stage the questions become more detailed and the required response tends to increase in size. This can be further complicated if the intermediate stages are used to refine the requirement interactively with the suppliers in some sort of dialogue. This whole process can be expensive for both the supplier and the procurer: a significant factor in public-sector deals (see Chapter 8 on European Union procurement law and practice).

The following timeline is based on a procurement that actually happened, for a government bid I managed some years ago. The review meetings referred to were with the end client and covered specific technical and business areas; they formed part of the procurement. My intention here is to show that there is more to a bid than just the resulting proposal document:

14 May: issue requirement specification;

8 June: open meeting with client and competitors;

8 June: internal SWOT (strengths, weaknesses, opportunities, threats) analysis;
10 June: meeting with subcontractor (re partnering);
15 June: internal bid approval meeting;
18 June: red team draft;
22 June: red team review meeting;
25 June: receive proposals;
16 July: shortlist suppliers;
21 July: shortlist briefing – draft agreements issue;
26 July: supplier internal review agreement 0.1;
30 July: v0.1 review – government client;
9 August: v0.2 review – government client;
30 August: v0.3 review – government client;
20 September: v0.4 review – government client;
mid August for September: due diligence data requests;
last two weeks of September: supplier presentations;
September and October: reference site visits and supplier visits;
4 October: v0.5 review – government client;
18 October: v1.0 review – government client;
25 October: formal agreement v1.0;
by 29 October: BAFO ITT;
by 9 November: tender required;
by 12 November: evaluation complete;
by 19 November: execute agreement.

ARE THEY REALLY HARD TO DO?

As with most things, proposals are only hard to do if you haven't had the practice. In the old joke, a passenger asks a taxi driver: 'How do you get to the Albert Hall?' The driver says: 'Practice, practice, practice.' In winning bids, it also sometimes seems as though luck is a significant factor. People like me make bids all the time – I have been doing them for tens of years whilst also working as a freelance writer. Most of the time I find it easy, and I do get asked: 'How do you know how to do that?' It would be nice to be able to say that it was down to great intellect, but in fact it is largely practice. The process might look simple, but it has taken me years of experience, trial and error. Even now it isn't always easy.

There's a saying in aviation: 'Superior pilots use superior knowledge so that they never have to use their superior skills.' This is all well and good if you have the experience, but many people who find themselves writing proposals as technical or knowledge specialists do so only infrequently. So it is reasonable for them to find it difficult. Proposals are not rocket science, but there is a lot more to them than might be expected. They can have all the complexities of a major project plus the added difficulty of the need to make a compelling case for why you want the client to accept your proposition. It is OK – indeed wise – to look for help.

KEY POINT

Colloquialisms such as 'rocket science' are acceptable in books and casual conversation, but are not recommended when writing bids.

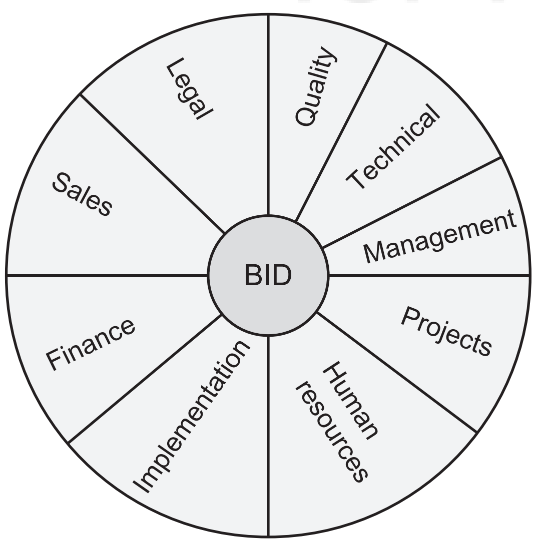
MANAGING BIDS

Although this book is mainly about writing rather than bid management it is worth describing the key elements of the way bids are run. This will throw light on the overall process likely to be involved and may help make sense of what is going on. In addition, those who find themselves producing the majority of a proposal or even the whole thing (perhaps in a small or medium enterprise (SME)) may find that it provides a useful framework. To a large extent bids are like projects, and, indeed, many organisations use mainstream project managers to run them. That said, some good project managers seem to make very poor bid managers; they focus on the mechanics at the expense of the creativity and sales factors that produce the 'win'.

Resources

A critical factor in any proposal is the set of resources needed to complete it. These can cover a wide range of specialisations. Figure 2.2 shows something of the overall

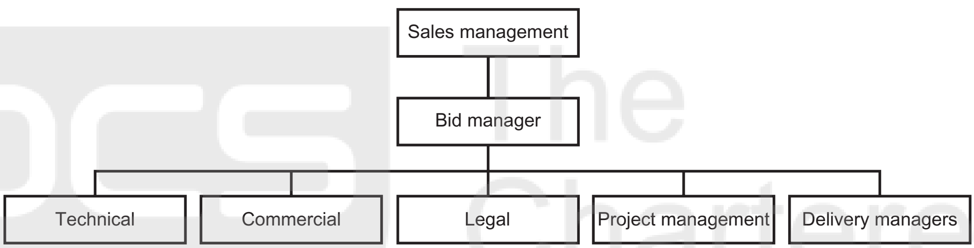
Figure 2.2 Context of a bid or proposal



context of a bid. All of the specialisations shown have their own cultures and approaches to work and will need to be integrated into a single, compelling story if the bid is to succeed.

The structure of a typical bid team might be expected to look something like that in Figure 2.3, though it can be simplified further to consist simply of bid management and a set of subject matter experts (this term is jargon again, and the abbreviation 'SME' is often used for it, though in this book it has a different meaning). They all contribute their own words, prices and concepts to the proposal submitted to the prospective client.

Figure 2.3 A typical bid team



Timetable

At first sight this seems obvious: once you have decided to bid then you need to get everyone going. In fact successful organisations are ahead of the game here. They use their market knowledge and customer relationships so as to be aware of bids and what they are likely to cover before the news reaches the wider world; they know about the bid and influence it before it is issued to a general audience. Further, they are aware of trends in their market and anticipate the type of knowledge that is becoming sought after, and they create material to support bids continuously. They use this (horrible jargon word coming up) 'sales collateral' to support their bids and have it in place before they start the response. Even if your organisation does not do this, most bids fit into the following basic plan.

Requirement issued. Client delivers document to supplier(s).

Opportunity reviewed. The requirement is assessed internally – decision is taken on whether to bid.

Resources allocated and planned. Define who writes what.

First draft. Write.

Review. Internal and external client input is added if this is allowed.

Later draft(s) and reviews. Rewrite.

Sign off.

Produce and submit. In hard copy or electronically.

The timeline given above is built around the written submission, but there will be parallel activities for costing or pricing and for developing the technical side of the bid, too. Note that the times for each stage will vary considerably according to the nature and complexity of the bid. In reality the simple truth is that there never seems to be enough time.

KEY POINT

In any bid the most precious commodity and consideration is time. There is never enough of it, and anything you can do to save time will be good news. For example, write any easy parts of a response as soon as you can – don't leave them while you sort out the hard stuff. The easy becomes hard when there is little or no time left!

Methods

There are numerous organisations that have, or claim to have, the definitive method for producing effective proposals. There are references to some of them at the end of this book. These methods range from just a simple acronym such as my own 'win bids with EASE (Effectiveness = Audience + Simplicity + Evidence)' to complex and detailed methodologies combined with a plethora of supporting documentation materials, training courses and suitably priced consultancy. A quick trawl of the web will produce many offerings, though there are dominant suppliers. There are even qualifications available for those who want them, or need them for their role. It is interesting to speculate whether, if you choose the largest supplier, you are simply going to get the same skills and approach as everyone else, losing the potential for differentiating yourself from the masses.

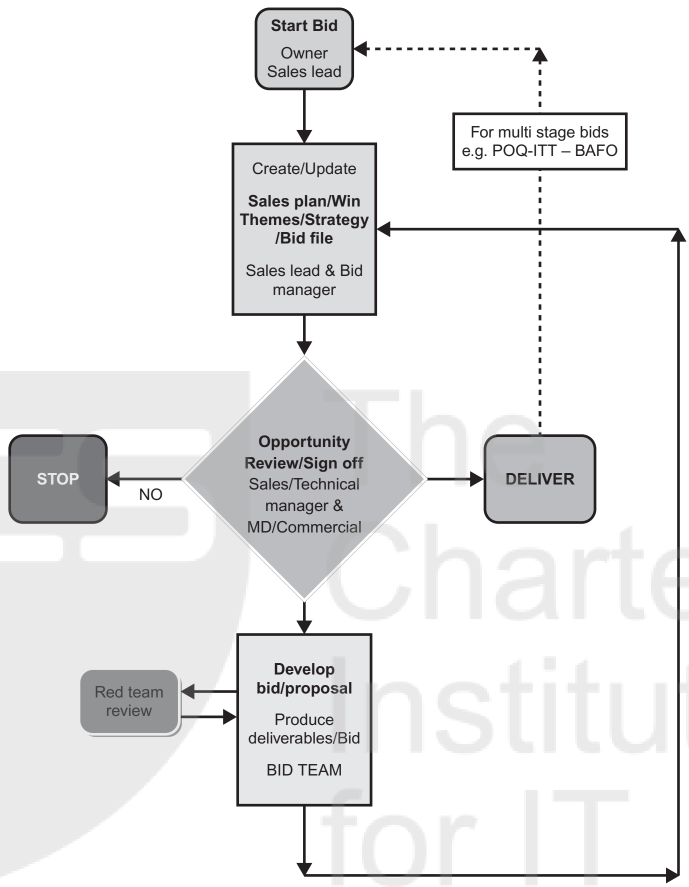
A basic method

As I have said, there are some very complex and comprehensive methods in use, many of which are long because they need to cover all the corporate sign-offs, approvals and interfaces with an organisation. In organisations where there are quality standards such as ISO 9001 there is also the overhead that goes with making that effective. However, to provide an illustration of the core elements you might expect to find, Figure 2.4 shows a simple method similar to one I have produced for a few clients. The terms PQQ (pre-qualification questionnaire), ITT (invitation to tender) and BAFO (best and final offer) are relevant to public-sector procurements (see Chapter 8 and the glossary in Chapter 10), but they are shown here so as to allow the process to deal with multiple-stage procurements. 'Red Team' refers to some kind of independent review for quality control and related purposes. The figure is largely self explanatory, and its purpose is to give proposal contributors an appreciation of what is likely to be going on around them.

KEY POINT

When choosing a method for bids consider what is best for you and what will best help you differentiate yourself from your competition.

Figure 2.4 A simple bid process



CASE STUDY

I had a client who had no bid process of any kind. When the team was asked to produce a proposal they would wait a few days or weeks (as long as it took for the deadline to become frightening), and then panic and throw every resource they had at it, regardless of expense or consequences.

It was at this point that they engaged me to help with the writing. There were four days to go, and they had not even looked at the requirements documents, which listed over 50 mandatory requirements and about 12 desirable ones. What this meant was that they needed to write, essentially from scratch, a document that had to be the best part of 100 pages long, and worse, they had only some of the expertise needed locally; much of it had to be referred back to an overseas parent company.

By this stage completing the job was almost impossible, and local management suggested using as much 'boilerplate' as possible despite the nature of the requirements, which were somewhat bespoke. However, eventually even they were convinced that the bid was impossible to pull together, and a last-minute 'no bid' decision was taken. Sadly, however, the overseas parent decided that it was 'core business' and insisted that a bid was put in.

The end result was unsurprising; a botched job was produced with pricing to match. It was submitted despite the kicking and screaming protests of all, including myself. The recipient was unimpressed and pointed out they were many times out on price, too.

Had the company adopted a simple bid process where they identified the scope and resources needed for the bid (and established whether they were available and could be committed), and so forth, then a sorry outcome could have been avoided. A bid process with appropriate supporting documentation might also have meant that decisions taken at all levels would have been more informed.

Note that this case study covers the project and production elements of the bid, but you also have to ask yourself about sales opportunity qualification issues – did the team even have a clue about the bid being winnable?

SUMMARY

Proposals are there to define and limit the offer you are making and to persuade the client or recipient to accept it (or support the case you have already sold). They have a natural lifecycle that forms part of the procurement lifecycle. This, like negotiation, may be iterative or, like the OJEU (see Chapter 8) lifecycle it may consist of a series of proposals acting as filters until only one deal, the winning one, remains.

In some cases the procurement is initiated by the supplier contacting the client with an idea for change. This should make things easier, since the supplier should be ahead of the proposal writing game. However, even then it still sits within the procurement cycle – the cycle is just entered at a different point.

Being aware of the context of proposals – who and what they are for – helps the author understand what to write and what needs to be achieved. This should make writing them that bit easier.

3 PREPARING TO WRITE

Read this first.
Found in many manuals, sometimes too late to be of use

AT A GLANCE

- the communications cycle;
- some basics;
- Orwell's rules;
- grammatical hints and tips.

INTRODUCTION

This 'read me first' chapter provides a potted set of hints and tips for those who don't have to write regularly. It is intended as background reading to help you before you set pen to paper, and gives a fast-track guide to help with business writing. Other resources, often more comprehensive and formal, are listed at the end of this book.

Although the book is aimed at native English speakers this chapter aims to serve as a reminder of some basic grammar and, perhaps, also to help those for whom English is a second language.

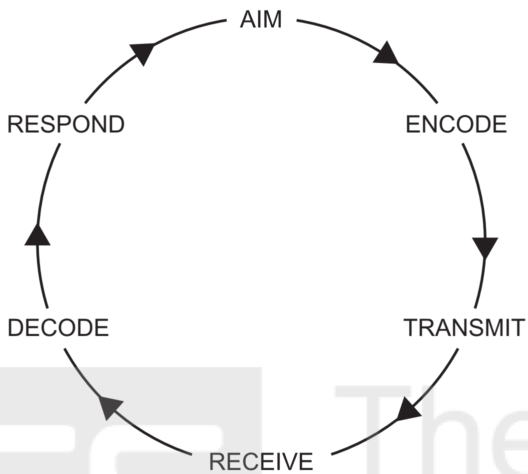
If you are more in practice at writing you may prefer to pass directly on to Chapter 4.

BACKGROUND

The communications cycle

It is worth knowing a little about what goes on when we communicate with one another (Figure 3.1). Although this is one step removed from the nitty-gritty of proposal writing, it is just as relevant for written communication as it is for speech. The only difference is that you have more time when the interface is via written media, though that is offset by the lack of personal interaction – you can't see or hear each other.

Figure 3.1 Communications cycle



1 AIM	**the need or desire to communicate with someone else (thinking, feeling, planning internally, setting objectives).** This is where senders think, feel, consider, decide and plan what they are going to say. It is an entirely internal process and is **completely invisible and inaudible to the receivers!** The factors that affect this stage are: ● attitudes; ● assumptions; ● prejudices; ● mindsets. You need to ask: ● What do I need to say? ● Who am I saying it to? ● What result do I want? ● How can I interest them? ● How do I prioritise what I am going to say?
2 ENCODE	**the translation of internal thoughts and feelings into an external means of transmitting them as a coherent message.**

	This is where the sender turns those thoughts into something that the receiver can understand. It can be written, spoken, made into a graph or a picture, or expressed as numbers, music or movement. There are many factors that affect the way we encode our messages: • education; • native tongue; • age; • gender; • experience; • vocabulary; • knowledge; • status; • expertise; • secrecy or openness; • personality; • personal preferences; • priorities.
3 TRANSMIT	**the transmission of the message (spoken, pictorial or written).** This is where the sender passes the message on to the receiver. After the transmission stage the message is out of the sender's control! Transmission is very much affected by: • body language; • inflection; • timing; • visibility; • audibility; • background distraction; • tone of voice; • spatial position; • stance; • gesture; • eye contact; • pauses; • stress; • speed; • how much information people can actually digest at any one time!

4 RECEIVE	**the reception of the message (how and why people listen).** This is where the message is taken in. At this point the receiver needs to pay particular attention to the message. Reception is very much affected by: • timing; • attention span; • interest; • priorities; • body language; • paralanguage; • alertness. **Active listening** on the part of the receiver is imperative at this stage. Active listening means: • listening all the way through without reacting; • asking for clarification; • paying attention to body language; • encouraging the sender.
5 DECODE	**the translation of the message into internal thoughts and feelings on the part of the receiver.** This is where the receiver tries to make sense of the message. Decoding is very much affected by: • education; • native tongue; • age; • gender; • experience; • vocabulary; • knowledge; • status; • expertise; • secrecy or openness; • personality; • personal preferences; • priorities. Obviously if the sender **encodes** in the same way that the receiver **decodes** then the message will be well understood!

6 RESPOND	**the need or desire to respond to the message that has been sent (thinking, feeling, planning internally, setting objectives and deciding).** This is where receivers send **their** message back and the whole cycle starts again. Here we need to consider: ● Do we know what we want out of this communication? ● Have we asked for clarification when we needed it? ● Have we encouraged the sender to keep on talking? ● Does our body language show that we want the communication to continue? ● Are we giving enough feedback to keep the communication going on? ● Are we sticking to the subject? ● Are we following the social rules of communication?

There is one cardinal rule to remember for successful communication:

> **The meaning of the message is the responsibility of the sender and not the receiver.**

This is not to say that receivers have no responsibility for the correct interpretation of the message (after all, if they do not read the proposal carefully it is highly likely that misunderstandings will occur) but that the key points we need to consider when we are communicating are:

- Have I thought about how the receiver is going to understand what I am saying?
- Is the receiver ready to receive what I am about to say?
- How can I make my message clear?
- What do I want the receiver to do with my message?

When you have limited knowledge of your audience, err on the side of caution. Don't assume they have deep technical knowledge; keep the language straightforward and neutral in style and content.

CASE STUDY

I heard of someone, a doctor who specialises in nutrition, accepted an invitation to deliver a 45 minute talk to a local society. His secretary accepted on his behalf and passed on the time/date etc. This was a lecture he had given many times before and was aimed at a non-specialist audience; it was fairly light hearted. The core theme was moderation in all things but deny yourself nothing. Things started well, but after 5 minutes the atmosphere soured. They were vegetarians and he was extolling the virtues of being able to treat yourself to a rare steak from time to time, should the fancy so take you.

KEY POINT

Know your audience.

WRITING – THE BASICS

Orwell's six rules for writing

In his essay 'Politics and the English Language', George Orwell offered the following 'six elementary rules' for writers.

1. Never use a metaphor, simile or other figure of speech which you are used to seeing in print.
2. Never use a long word when a short one will do.
3. If it is possible to cut out a word, always cut it out.
4. Never use the passive voice when you can use the active.
5. Never use a foreign phrase, a scientific word, or a jargon word if you can think of an everyday English equivalent.
6. Break any of these rules sooner than say anything outright barbarous.

Although he was talking about creative writing and journalism, his advice does make sense for any kind of writing. The following examples and comments on his rules should help.

1. Say 'now' rather than 'at this moment in time'.
2. It is very popular at the moment is to say 'utilise' instead of 'use', but it is not an improvement.
3. Keep in mind the journalist's motto – make it sharp, make it snappy, make it up!
4. Say 'John read the book', not 'The book was being read by John.' The main reason is that the first is easier to understand, but it also cuts down on the number of words – always a good thing!
5. In the air traffic control business they talk about 'bandstanding' when they mean operating a single runway for both landing and take-off (unlike the usual practice at a major airport, where you would usually have one for landings and the other for take-offs). For a non-specialist audience just say: 'using one runway for arrivals and departures'.
6. This is an exercise for the reader (writer)! Read what you have written and see for yourself. Try reading what you have written aloud (in private if you prefer). If it does not sound right then it is almost certainly not right – this is a good way of checking Orwell's last dictum.

A writing primer

This short section offers a few hints and tips on the writing style and approach for supplier documents. I have assumed that you are writing in English for someone whose first language is also English. If not, then you need to err further on the side of simplicity.

Here are some pointers.

Apostrophes. These are a minefield, but the grossest errors concern its (belonging to it) and it's (it is). In IT service bids the plural of SLA (service level agreement) is SLAs, not SLA's, and the same applies to key performance indicators (KPIs). It may look odd sometimes, but it is correct. The standard use of an apostrophe is to show possession, e.g. David's book. There are specific rules for where the apostrophe should go for plurals (the Smiths' book rather than the Smiths's book). See the resources section at the end of this book for where to find detailed help.

Singular and plural. You must get them to match! In longer sentences it is all too easy to forget (which is another good reason to keep sentences short). In particular, remember that a company or organisation is singular. So avoid saying 'ABCDE are experts in …' – this should be 'ABCDE is expert in …' (If you do want to use a more personal touch it is OK to say: 'At ABCDE, we work with you …')

Diagrams, figures and tables. Use them where they make things clearer (and save you words). Always give them a title and a reference. Always refer to them by their number, not 'before …' or 'after …' – when printed, they may not be.

Format. Use a simple layout. Include the page number and date on every page, and use an easily readable font in a sensible size (e.g. Arial or Times New Roman in 11 point). Set margins so that there is space for the reader to make notes. Use single-sided printing unless you are producing large documents or many copies, in which case save paper by using it double. See Chapter 8 for more detailed information on format and layout.

KISS. Keep it simple, stupid. Don't make things complicated if you can avoid it – be clear and concise.

Lists. Lists and bullet points are a fraught area. You can be very strict about them and follow the convention of a list being a sentence with appropriate use of full stops, colons, semicolons and so on. One possible example is:

- first item;
- second item; and
- last item.

However, particularly when viewed on a screen, something simpler can look better, even if it is technically wrong. For example:

- First thing
- Second thing
- Last thing.

You might even leave off the last full stop. Whatever style you use, **consistent for the whole document**. If using bullets then be consistent with them, too.

Paragraphs. Only have one topic in a paragraph.

Punctuation. Keep this simple, too. At a minimum, sentences start with a capital letter and end with a full stop. Try not to need more than two commas in between!

Sentence length. Try to keep sentences to fewer than 20 words.

Sentence structure. Keep it simple. Don't have lots of sub-clauses and conditional statements.

Vocabulary. Avoid jargon where possible; although it can be a useful shorthand so long as you know that only those familiar with it are in the audience. Never use a longer word or phrase where there is a shorter one. Avoid management or consultancy speak. Also, when writing a proposal do not be tempted to use slang or colloquialisms (as I have used 'rocket science' elsewhere in this book). What is acceptable in casual speech and writing is not safe to use in a proposal unless you are very sure the reader will be happy with it.

Names. Get your client's name right, and also your own. Be consistent.

NOTE

The Plain English Society offers online guides free, and provides chargeable training courses for those wishing to get help with the effective use of English.

Basic grammatical errors

For most purposes, unless the audience is known to be very strict on grammar you need not worry about such things as split infinitives. 'To go boldly' sounds no better, or more understandable, than 'to boldly go', although the difference does seem to have a disproportionate effect on some people. Indeed, what is correct or not varies with time, culture and fashion. Annoyance over the split infinitive is a relatively recent thing in the history of the English language; in pre-Victorian days it was not a concern. In fact, correct grammar does change with time, audience and usage, but there is still a general consensus on some basic elements, and I will try and cover them here. Keep in mind, though, that my original qualification was as a physicist, a breed not always known for literary aplomb.

CASE STUDY

As a child I was given some text to punctuate. My father recognised it as the work of Charlotte Brontë, pointed me at the appropriate page in Jane Eyre and said, 'There you are – homework done for you.' Ms Brontë only got 6 out of 10, however, as it seems the English teacher disagreed with her punctuation – even as to where the full stops went! That teacher is long since forgotten, but Ms Brontë's memory is still fresh. The real function of grammar and punctuation is to support you in getting the message across.

However, to get the message across understandably and simply, you do need to get the basics right. The following list covers a few points that crop up time and again.

These are specific examples, rather than the more general advice given earlier in the 'primer'. For those with overly zealous grammar addicts in their audience there is always Fowler's *Modern English Usage*, though, again, for the real world I recommend the Plain English Society instead.

It's and its. The apostrophe here is in place of the 'i' in 'it is'; it doesn't indicate belonging. 'Technology is at the heart of our organisation: it's our core strength.' Use 'its' to talk about something belonging to it: 'The company has a strong technology background. Its core strengths are in engineering and design.'

Capitalisation. This is a minefield, but following simple rules will help. Only capitalise:

- proper nouns, e.g. names and places;
- acronyms, e.g. TCO for total cost of ownership;
- words that are capitalised to give specific meaning as part of a standard or method.

Do not capitalise ordinary words, such as project, user, manager, project leader and so forth. **Be consistent**. Even if what you are doing turns out to be wrong (according to someone), the important thing is to be consistent, ideally with the way the client usually does it. For example, COTS is used for 'commercial off the shelf' software; ordinarily one would not capitalise these words within a sentence, but it is done in the acronym. Do not be tempted to use it sometimes as 'COTS' and other times as 'Cots'.

A or an (in particular, before acronyms). The basic rule is that 'a' goes before words that begin with consonants (for example, 'a cat'), and 'an' goes before words with a vowel or a vowel-sounding first letter (for example, 'an office'). An example of a word with a vowel-sounding first letter is one with a silent 'h' at the beginning (for example, you should use 'an hour'). With acronyms you either use what is appropriate for the first word in the acronym (for example, you would say 'a UN-sanctioned no-fly zone') or what would be correct if you read the acronym out as a word (for example, 'a NOTAM' – where NOTAM means 'Notices To AirMen'). My preference is to use what is appropriate for the first word. However, whichever rule you choose, use it consistently throughout the whole document.

SUMMARY

The material offered in this chapter is not intended as a substitute for authoritative guides on English usage. It is therefore sure to annoy some readers. However, it is not aimed at them. It is provided to give some context and some practical help for those in a hurry. Following the guidance given here may not make what you produce perfect, but it will make it 'good enough for military work'. You will get by.

4 PROPOSAL WRITING

Writing is easy. All you do is sit staring at a blank sheet of paper until the drops of blood form on your forehead.
Gene Fowler

AT A GLANCE

- how to write, edit and produce sales-related documents;
- benefits versus features;
- editing;
- coaching specialists to write positively, etc;
- basic grammatical errors and plain English;
- being unambiguous, avoiding management-speak, etc;
- sales themes and straplines;
- branding;
- summaries;
- style guides, writing guides and considering the audience;
- CVs and case studies;
- legal considerations;
- making it easy for the assessor or reader;
- use of appendices and brochures.

INTRODUCTION

This chapter covers editorial, design and wordsmithing activities that are rather more specific to proposal writing than the background and general information offered in Chapter 3. These tasks are sometimes delegated to a specialist proposal editor, bid production manager or technical writer. However, the information here is also useful to anyone who is involved in writing a section of a bid. If such readers only learn the difference between a feature and a benefit, then this chapter will have made a positive contribution to their work.

I recommend that you also look at the chapter on presentation and format, Chapter 9, to gain an understanding of the physical and design elements that contribute to the look and feel of a proposal. Chapter 6, on editing and reviewing, also builds on the topics addressed here, and it may be helpful to read it after this.

BACKGROUND

Choice of style

Those who studied for an English literature qualification or who have frequented creative writing classes or circles will have a concept of literary style that is somewhat different from what is needed here. Our objective is to use a style of writing that gets the subject matter across clearly and simply. Those who read your proposal are usually pushed for time; they will be reading several proposals, and you need to make it easy for them to see why your case is a winning one.

KEY POINT

There is a caveat to this: the golden rule of 'know your audience'. If you happen to know that the key decision maker is an ex management consultant windbag, who likes to use as many of the longest words available in rambling meaningless sentences (apologies for the stereotype – it makes the point, though), then you may want to adopt some of their language and 'leverage' their own style – much as this horribly long sentence is doing. However, you won't often be penalised for making a clear point, though you may frequently be for being incomprehensible.

The journalist's motto is: 'Make it smart, make it snappy, make it up!' The last of these is not advised, but keeping things short and simple is highly recommended. The less scope for misunderstanding and confusion there is, the better.

KEY POINT

What you write and submit to suppliers will give a strong impression of what your organisation is like to deal with. A badly constructed, poorly presented document will give a negative impression. Keep in mind that suppliers are potential partners and how you come across to them matters. They may even become your customers, so put in the effort to do a good job.

Good advice

At this point it is worth saying that you shouldn't write anything you don't have to – it takes time and effort that can be spent on potentially more profitable activities. Before you produce any document (not just for a procurement), you should ask yourself the following questions.

- What is this document for?
- Who will read it, and what do I want them to get out of it?

- Do I have all the information needed to write the document?
- Is it really needed?

Until you have done this, don't write a thing. Once you have done it, and have a good reason to continue, then don't hold back.

See also the later section in this chapter on writing style and skills.

WRITING FOR PROPOSALS

Making it easy for the assessor or reader

This goes hand in glove with 'know your audience'. As a proposal author you are very aware of the stress that proposals can cause you, particularly if they are not part of your everyday job. Keep in mind that this often applies to the people on the receiving end, too. Unless they are professional procurement advisors they are likely to have a day job and to find evaluating bids as strange as you find writing them. What is more, you only have to write your own proposal; they will have to read and assess several. The more time you can save them and the easier it is for them to understand what you are offering, the happier they tend to be.

> **KEY POINT**
>
> Make life as easy as possible for the assessor. This makes them well disposed towards you and makes you appear professional – you will get higher marks for the same technical content.

What to do and how it helps

- **Answer the question** (ATQ) that was asked, clearly, at the start – not the one you wished they had asked, or that you wanted to answer. If they can see quickly that the question has been answered then they can quickly put a tick in that box and move on, avoiding being distracted or confused by other material.
- **Leave out material not asked for and not relevant.** This is closely related to ATQ, but is specifically aimed at those who want to put in explanations or background material that is not generally asked for. It helps by saving time and keeping the material focussed.
- **Summarise longer answers.** This points the way and guides the reader through the answer. If they can see that you have addressed all points they may not need to read everything on the first pass – when they are deciding yes or no as opposed to giving a specific quality score.
- **Use figures and diagrams.** As with summaries for longer answers, figures can remove the need for detailed reading and so save time. They are often easier to understand, too.
- **Make benefits to them clear.** Getting these across early in an answer, and clearly, means readers can then go on to see whether they are justified, in the knowledge of what they are looking for. It is easier to find what you already know you are looking for.

- **Use appendices for background information, if it is needed at all.** This makes the 'story' easier to follow; the background is there if readers feel they need to check it, but they don't get bogged down in it.
- **Be unambiguous** – make sure there is no scope for confusion. This stops the assessor having to reread material to get at the meaning, which saves them time.
- **Use supporting evidence.** Short examples, case studies and supporting client quotes make it easy to see that what is said is credible without having to read in more detail to be convinced, thus saving time.
- **Apply the 'so what' test to every answer.** If everything they read adds value to the answer or helps make the required point, then the readers will not feel that they are wasting effort.
- **Minimise cross references.** It is pain to have to keep looking back and forth to work out whether or not the answer has been covered. Using cross references sparingly avoids wasting time and also makes your document simpler to understand.
- **Use plain English** and avoid jargon and management-speak as far as possible. This reduces the chances of misunderstanding and avoids making assumptions that might not be true about the background knowledge of the reader. Also, few people get annoyed by plain English, but many get annoyed by jargon. Finally, be cautious about using colloquialisms (for example, 'touchy feely', as used in this book) or anything that might count as a cliché. At all costs avoid slang or bad language.

The suggestions listed above may not always be compatible with each other in all procurements. For example, the client may specify that you can only say what you will do, not how it will be done, and for certain questions this may preclude the use of supporting evidence. This is an art, not a science, and some judgement will be needed.

Writing style

Active voice

At the risk of annoying you with a cross reference, the points made in the earlier section on 'making it easy for the assessor or reader' actually provide a good starting point for proposal writing style and need not be repeated. When writing a proposal the default style should be a simple, positive one. Those familiar with grammar checkers will have come across references to the passive and the active 'voice'. The difference comes down to saying things directly or indirectly.

The following phrases both mean the same, but the effect is different.

Passive voice: The wolf was hit by ACME's rocket.

Active voice: The ACME rocket hit the wolf.

A more businesslike example follows.

Passive voice:

Hosting of your web servers will be done by the ABCDE Corporation using its eco-friendly, secure data centres.

Active voice:

The ABCDE Corporation will host your web servers using its eco-friendly, secure data centres.

Sentence and paragraph length

Conventionally a paragraph explains or demonstrates a key point or concept or a central idea, and for this reason, in a proposal, it tends to be relatively short. I would expect most paragraphs to be no longer than a quarter to half of an A4 page and not to contain more than a handful of sentences.

Another important factor in making a proposal easy to read is sentence length. Long, convoluted sentences, with many sub-clauses, caveats, exceptions, references to extraneous material and jargon-specific words (somewhat like this one – see also 'A writing primer' in Chapter 3) become hard to understand. That sentence is by no means the longest I've seen; some have been several hundred words long.

For the average native English speaker a rule of thumb is keep sentences under 16 words long. There is no need to be too ruthless with this; two or three words over won't matter, but 10 or more will.

Lists

Many sentences are long because they are lists. For example:

> We will implement your project within the required timetable using an agile software development methodology, prototyping, appropriate quality assurance tools, change control, weekly and monthly reporting, exception monitoring, risk management, all with our in-house resources at our UK software development facility.

This can become:

> We shall implement your project within the required timetable using:
>
> - an agile methodology;
> - prototyping;
> - appropriate quality assurance tools;
> - change control;
> - weekly and monthly reporting;
> - exception monitoring;
> - risk management;
> - in-house resources;
> - our UK software development facility.

Sentence complexity

Long, complex sentences can be broken down into shorter components that are easier to digest. For example:

> Whilst keeping in mind, at all times, that quality targets must be met, we will use the XYZ software development methodology, proven at many clients, to reduce time to market, a key goal, and deliver working deliverables on or ahead of schedule for the ecommerce system.

This could be made easier to understand and more convincing as follows.

> We will use the XYZ method to meet your goal of a reduced time to market for your ecommerce system. This has been proven to deliver ahead of schedule at many clients already and includes effective quality management controls.

These examples are deliberately tame compared with much of the material I have seen in real life!

KEY POINT

Another useful technique is to look for opportunities to replace several words by one. For example, 'in a very few instances' can become 'seldom'. Also avoid using a long word such as 'utilise' where a shorter one, such as 'use', can take its place.

For those of a literary inclination, the advice is to make your style closer to that of Hemingway than of Proust.

Win strategy

This is the territory of whoever is leading the sale or campaign. You stand a better chance of winning business if you actually have a strategy to follow that recognises what the client wants and what you have to offer. Such a strategy will include the choice of who engages with the client's people and a plan for what information they want to acquire or what message they are to get across. Such communication strategies can be significant documents in their own right, and can also cover such things as a SWOT (strengths, weaknesses, opportunities, threats) analysis, assessment of the competition and of the client's longer-terms plans, and so forth. If one exists then you should ask to see it, since some of it may help frame what you write.

WIN STRATEGY EXAMPLE

It was known that the main competitor for a bid I was working on had a better reputation for applications development but that my client had better operational expertise. Part of the win strategy was to make sure there was extra detail and care taken in the areas where there was a perceived weakness and to demonstrate with case studies previous successes in applications. In parallel with this, the bid emphasised how important for the long term was the operational skill – the message being that the development was only 30 per cent of the total cost over a five-year period and that failures in operation causing any defects in service delivery would affect not only cost but also reputation.

From the point of view of the technical expert what matters is how the win strategy affects what you write. You need to be aware of it, and you may also make a contribution to it based on your technical expertise and client knowledge. If you are not involved then something has been missed. If there is no such strategy and you are on your own, then it might pay you to take some time to consider why you think the business can be won. The following section on simple themes, branding and so on can help here.

SALES THEMES, STRAPLINES AND BRANDING

This area can be a useful add-on to any basic style guide. It is something that helps reinforce the overall approach, the 'win strategy' of the bid. In an ideal world such material will have been developed for you, but the world is not ideal and I've known many technical people who find themselves pulled into this sales or marketing arena, often against their will. It may seem 'touchy feely', content free and technically unimportant, but it does actually make a difference.

Sales themes

Sales themes can be very powerful for linking all the elements of a bid together into something with a compelling and consistent message.

It is not a good idea to have too many themes, or to have ones that are too subtle or nuanced. Three seems to be a good number, and I would say that you should absolutely never have more than five. When it comes down to it, sales themes map onto benefits (see later in this chapter), and in real terms there is a limited number of those, based on things that are better in some way or that represent better value for money. They can sometimes come across as a little on the generic side, so it is worth explaining, at least to those writing the bid, a little about the context and meaning of each sales theme. This will give writers a better understanding of how to use and support the themes.

The following example sales themes might be used for an ecommerce proposal, the tender being to improve the public-facing website of a retail organisation.

> **Increased reliability.** The existing site is known to suffer from higher than average unavailability, meaning that potential shoppers give up and go elsewhere.
>
> **Value for money.** This would result from reduced downtime and maintenance costs.
>
> **Faster turnaround.** Shoppers have reportedly complained about how long it takes to get to the product information they want to see and from there to the point of completing the transaction. Again, this results in shoppers giving up. The message is that faster turnaround improves overall revenue.

Themes should map onto deliverable or measurable benefits and avoid those that are matters of opinion or conjecture. For that reason I recommend not using words such as 'believe', as in 'we believe this offers good value for money', since this implies a lack of confidence. The 'believe' word also has some unfortunate connotations, as it is frequently used by politicians (and others) when under pressure, lacking information or lying. Use it with caution if at all.

Straplines

As with sales themes, it can be useful to have a strapline: a simple phrase or message that supports the core value or central idea of a proposal. These can sometime end up being too much along the lines of marketing or consultancy speak, but they can help. You might use one in the form of a quotation that you repeat at the start of each major section of the document, or you might have it as part of the footer of each page – though the latter can get tiresome in very long documents and lose impact through too much repetition.

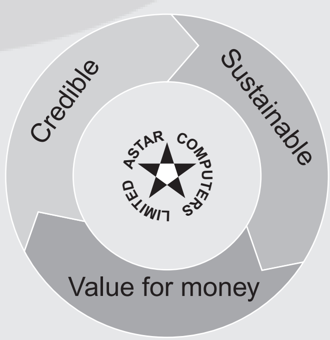
> **EXAMPLE**
>
> The phrase 'making you easier to trade with' was a strapline used for a bid for upgrading an ecommerce website. The sales themes for this bid were: making the website easier to use and navigate, making it safer and more secure and delivering a faster, simpler buying solution. The strapline summarised in one phrase what the client was going to get out of the proposed solution.

My personal strapline is 'win bids with EASE (Effectiveness = Audience, Simplicity, Evidence).' I also consider this to be good advice for anyone writing a proposal: know your audience, provide them with evidence that what you are proposing will work and make it simple to understand.

Branding
Branding is a whole subject in its own right; there are many books on it, some of which are listed in the resources section at the end of this book. It would not be practical or appropriate to cover the subject properly here, but it is useful to be aware that you can help a bid's chances by simple branding ideas such as the use of logos and consistent presentation. The following points are worth considering both for a proposal and for any follow-up presentations and demonstrations.

The function of branding is similar to that of the strapline but with more graphic impact, perhaps in the form of a badge or logo. I've used the concept of a virtuous circle in the past, where three themes support each other.

EXAMPLE USING A LOGO AND SALES THEMES



	Credible	Astar's experience, proven service model, track record, breadth and depth of resource for proposal writing and financial stability. So ...
	Sustainable	Breadth and depth of resource, established quality-control and escalation processes, financial backing to rewrites. So ...
	Value for money	Proven delivery process, economies of scale from existing investment in IT equipment, return on previous investment, creative writing. So ...

(Astar is my own company, and this example is fictitious. In practice you would want to use the client's logo as well as, or in place of, your own, but the idea holds good.)

The use of style and writing guides

If you are working as part of a professionally run bid team there is a good chance that there will be some sort of style or writing guide. Many companies have guides that cover all written or published materials; these vary in how restrictive and controlling they are. If they are policed then you will know about them. They will typically cover fonts, layout, language and so forth. If there is one, then – whatever your views on its merits – it makes your life easier, as you just need to follow it, not to think one up for yourself.

Following such a guide means that the entire proposal will have a consistent look, feel and overall presentation style, so that it comes across as a cohesive document. This gives a positive impression and makes it easier for the client to understand it, with the resulting benefit that they are likely to give it a better score.

So, if there isn't one, and you are writing a substantial amount (especially if you are responsible for writing the whole proposal) then it will be worth your while spending a short while creating a basic style and writing guide. Such a guide could include instructions for:

- content – what the proposal will actually contain and in what order;
- sales themes and straplines;
- page size, orientation (portrait or landscape), margins and columns;
- page count and word count (particularly if specified by the customer);
- numbering – where, what format and whether dated;
- headings – document heading, chapter heading and company logo;
- font – styles – titles, subtitles, Heading 1, Heading 2, etc.;
- line spacing, hyphenation, breaks and indents;
- grammatical style – capitalisation, singular or plural, etc.;
- tables and diagrams – numbering, titles and placement;
- lists;
- footnotes and cross references;
- quotations;
- a glossary of terms;
- reference listings (title, author, publisher, date …);
- an index;
- templates.

There is an example style guide given in the resources at the end of this book, and there is also a writing checklist at the end of this chapter.

'Unique' selling points and unique perceived benefits

Since the first salesperson tried to sell the wheel to a cave dweller they have talked about 'USPs' – unique selling points. The term sounds good, but is seldom actually true unless you are happy to play very fast and loose with the word 'unique', as many in sales are.

The general idea is that the customer is persuaded to buy because there is something that only your organisation can do. My contention is that, if this is the case, you are very unlikely to have to write a proposal for it – the world will be smashing down your door, holding out bundles of cash. In reality (and in particular the reality of those offering complex technical solutions or services), there are likely to be many organisations that can do the job, and for a plausible fee.

The 'unique perceived benefit' (**UPB**) grew out of the lack of USPs in the real world. It boils down to our old friend, 'know your audience'; you are aiming to present the benefits of your offering, using your knowledge of what the client needs and wants, in such a way that it becomes unique to you. This is best demonstrated by the short case study shown in the box. It is worth noting that 'perception' makes up part of the effect; it may still be true that others could do the job just as well, but you have identified what makes it special for the client.

CASE STUDY: UNIQUE PERCEIVED BENEFIT

Client X was procuring systems to improve its point-of-sale abilities, but its market presence was a 'no frills' one: the marketing pitch to its customers was that they spent money on the goods in the store, not on expensive shop fittings. The winning supplier recognised this and offered to supply state-of-the-art back-office equipment but to refurbish the existing point-of-sale tills in the stores only internally. The shops' equipment still looked 'lived in' and the shoppers did not get the impression that 'their' money was being wasted. They still had the perception of value for money, while Client X benefitted from the improved efficiency and reduced maintenance costs of the 'new' equipment. The UPB was the recognition that Client X could have the new equipment without adversely affecting its brand.

Unlike a USB, the UPB is more likely to be something that you might have, at least within the context of a specific procurement.

PRESENTING FINANCIAL INFORMATION

This book is aimed at technical people who are writing proposals, so it is reasonable to assume that most readers will be writing technical responses. However, it is quite possible that some of you will be involved in costing and the presentation of that information, either internally or (as pricing) to the end client.

NOTE

The world of pricing is much more complex than what can be covered here, and this is not a book about pricing models and so on. I have identified further material for those interested in matters financial, which is presented in the resources section at the end of the book. The terms included here are for background.

Internally financial information will probably be in spreadsheet form, and it will need to cover fixed and recurrent costs together with estimates of 'risk' – where you are uncertain of the exact costs, for various reasons. Costing and pricing are outside the scope of this book, but a little information is provided here in case you need to write about it.

KEY POINT

Know the difference between a price and a cost. It boils down to: if you are selling, then it is the price that you are asking; if you are buying, then it is the cost that you have to pay. The difference comes down to the profit or return the seller is making on top of their raw cost. One person's price is the next person's cost.

Format

When presenting prices it is important to be clear and accurate. You should state numbers in full rather than using abbreviations (such as 'K' to mean a thousand).

Leave a space between the currency symbol and the first number in a price. Punctuate currency values with commas between each thousand. Where the level of detail demands it, use a full stop as a decimal point before pence, cents or similar units.

Itemise each element clearly, with all relevant information such as unit costs and quantity. Identify recurrent costs and one-off costs.

Tables 4.1, 4.2 and 4.3 give an example presentation.

Table 4.1 Fixed costs (example)

Item	**Price**	**Quantity**	**Total**
Server licences	£ 400	2	£ 800
Server hardware	£ 2,000	2	£ 4,000
Installation	£ 600	1	£ 600
Laptop computers	£ 300	6	£ 1,800
Laptop licences	£ 125	6	£ 750
Commissioning	£ 30	6	£ 180
		Total	**£ 8,130**

Table 4.2 Training costs (example)

Item	Price	Quantity	Total
User training	£ 60	6	£ 360
Administrator training	£ 450	2	£ 900
		Total	**£ 1,260**

Table 4.3 Annual costs (example)

Item	Price	Quantity	Total
Maintenance	£ 1,200	1	£ 1,200
Service desk	£ 1,700	1	£ 1,700
		Total	**£ 2,900**

You should state whether the information you are presenting includes or excludes taxes such as VAT. You should also be clear about any discounts or automatic variations, for example for inflation.

When quoting for a foreign currency state the exchange rate used.

Margins and mark-ups

The difference between the cost and the price can also be defined as the amount you add on to your cost before selling to your customer. This is usually done, and expressed, in terms of either a mark-up or a margin. It is helpful, when providing cost information to be used as the basis of a price or if calculating a price yourself, to know the difference.

The simpler idea is that of a mark-up. For example, if your cost is £100 and you mark it up by 20 per cent, your price would be £120.

A margin is where the profit element is expressed as a percentage of the end price. For example, if your end price is £100 and your margin is 20 per cent then your cost would have been £80. In other words, 25 per cent of the price is profit compared with the cost. If you think about it, this means that a 50 per cent margin is the same as a 100 per cent profit.

Note that margins sound lower than mark-ups. This is one reason they are sometimes used, to make prices seem more reasonable.

KEY POINT

Where a client specifies that you should present financial information in a specific way, use that format – an obvious point, but often ignored, leading to poor results. You can always comment on the figures to highlight the strengths of your offer.

Fixed price versus time and materials

These are the two most common forms of price offering. In the case of a fixed price you are specifying a straightforward sum to cover the entire supply of the product, service or solution. For clients this is the simplest pricing option, since they know exactly what they are going to pay. It means that you, the supplier, are taking on any risks associated with the project costing you more to deliver than you had thought it would.

A time and materials price is one where you quote rates for labour cost (possibly split according to the type, skills or experience of the staff used) and prices for equipment and consumables on an 'as-used' basis. This is very useful if the client has an open-ended requirement or a continuing need (for example for maintenance staff), as it removes any risk from the supplier. For that reason it is usually only found in contracts to supply labour on a 'call off' basis, in much the same way that a garage will charge for its mechanics' time when working on your car.

Estimates and indicative pricing

When presenting prices that are based on incomplete information you may be asked to provide an estimate. Keep in mind that an estimate is usually expected to be a price that is close to, or more than, the eventual cost to the client. Some margin of error is allowable, but huge changes, for example from £100,000 to £200,000, would invite comment.

Where you feel that even a reasonable estimate cannot be given you might wish to use the phrase 'indicative pricing'. This implies less certainty than an estimate.

Terms and conditions

Any price offered to a client will inevitably have terms and conditions associated with it. As a technical expert you are not expected to be a legal expert, but you should be aware that terms and conditions (often abbreviated to 'Ts and Cs') affect the actual cost and therefore the price.

Basic elements can include the following.

Currency. You need to be clear about which currency is being used. Where currency conversions are possible there will need to be some agreement as to how they are managed and maintained over time, when rates may change.

Value Added Tax (and other taxes). You need to be clear as to whether or not VAT is included in the price quoted. There is often a significant difference.

Payment schedules. When you get paid will have an impact on your cash flow and hence on your overall cost (see also the TCO model, described later). So it is important to be clear when this is. For example, you might have an upfront payment then some more based on project milestones completed, or you may just be charging a quarterly service amount.

Financing options (how the deal is funded). You might, for example, lease equipment to a customer or even buy their existing equipment from them as part of a deal to deliver a service. This can have significant impact on price.

Service level agreements or credits. Where a service is being provided there can be changes in price associated with performance delivered against some measure or other. This, again, is subject in its own right; see the resources section at the end of the book for references.

Assumptions. Clearly state any assumptions that have been made, together with the changes to the price that will occur if they are not valid. For example, you might quote a price based on supplying a certain quantity of equipment. If more or less equipment were to be needed, this might change your price. Such assumptions need to be stated.

Contingencies. These are changes in price that happen if a specified event happens. They are related to assumptions and can be used in a similar way. They are often considered as part of the supplier's costs, and are not shown in the price as separate items. Instead they are included in a 'risk' factor as a safety measure. This might be a way of sharing risk where there are uncertainties because of considerations outside supplier and client control.

Validity. It is normal to state a period for which a quote is valid, typically 30 or 90 days. After that time you reserve the right to re-quote.

Law. In the UK it is normal to state that the contract will be governed by UK law, even though this may seem obvious. When bidding outside your own country it is important to state what legal system applies (and to agree it with the client).

Open book accounting

Mainly in the public-sector market (though not exclusively so), some contracts demand that you allow clients access to the relevant areas of your accounting system. This is so that they can see that you are being open and above board in your dealings with them. In the public arena this may be necessary for 'transparency' reasons, where it must be shown that the government concerned is realising value for money. It is worth noting that not all organisations will sign up for this, so, if you see it referred to then draw it to the attention of the appropriate commercial authority.

Total cost of ownership

Total cost of ownership (TCO) is a useful thing to be aware of, as it is a well-established, 'holistic' approach to comparing costs (from the point of view of the purchaser). There is nothing 'rocket science' about it: the fixed costs and running costs of providing a service or product are added up over a period of time and then assessed to give a like-with-like comparison. This is very useful where different suppliers build their prices in different ways.

For example, Companies A and B are both bidding to supply an email system. Company A uses a pricing model where they charge for all the equipment and software, and the installation and commissioning, in advance but then only ask for a small administration fee each year to maintain the service. Company B charges nothing up front but charges a fee for every email that is sent or received. A further difference is that Company A installs all the equipment on the client's premises, whereas Company B only installs a communications system which connects to their in-house system. Tables 4.4 and 4.5 show how these two systems might compare over three- and five-year 'TCO' models, on the assumption that the email system handles 1.2 million emails per year.

Note that this is a simplified example, and the numbers and elements involved do not reflect a real-world problem. The intention is to illustrate the concept only; the figures are not representative of reality.

Table 4.4 TCO example: Company A

Price element	Type	Value
Equipment, installation etc.	Fixed, one-off	£40,000
Service charge	Recurrent, annual	£ 2,500
Cost of office space, power for servers, etc (internal client cost)	Recurrent, annual	£ 6,000
Per email	Recurrent	£ 0

Table 4.5 TCO example: Company B

Price element	Type	Value
Installation	Fixed	£ 0
Service charge	Fixed	£ 0
Cost of office space and power (one cabinet only)	Recurrent, annual	£ 250
Per email: £0.015	Recurrent, annual	£ 18,000

For a three-year service and contract lifecycle the TCO of Company A's offering would be £65,500, the equivalent of £21,833.33 per year. There is no assumption as to the number of emails sent, but at the quoted value of 1.2 million per year that would be about 1.8p per email.

However, were the contract to be extended for a further two years the total cost would reduce to £82,500 – the equivalent of £16,500 per year (1.4p per email).

Again, the assumption with Company B is 1.2 million emails per year (though variable use would affect all of this cash flow – but that is another lot of arithmetic).

For a three-year service or contract lifecycle the TCO with Company B would be the equivalent of £18,250 per year (a little over 1.5p per email). However, if the contract were extended for a further two years then this would still be at the same pro rata cost, of about 1.5p per email.

Over five years, therefore, Company A's option has a lower TCO.

NOTE

If you consider that your solution offers significant benefits when viewed on a TCO basis then it is worth saying so (even if you are not given a pricing format that makes this easy to do). By pointing it out you nudge the client into taking it into account.

SUMMARIES

Use of precis

The art of precis, as taught in schools in days gone by, is largely a lost one. Traditionally the precis was a summary of a larger document, covering all the points made in the original. ('Precis' is a fancy name for a summary.)

In proposal writing it can be helpful to do this exercise backwards. Writing a precis of what you intend to communicate to the reader can save a lot of time later. If you take the time to think about what you want to communicate and why it will be helpful to the reader, then you can make the actual time needed to write it that much shorter.

You can do this just as well by writing a series of bullet points covering what you need to include. Structure them in a sequence or hierarchy that you think will be clear and acceptable to the reader.

Executive summaries

In general executive or management summaries are written to persuade the non-specialist decision maker that your proposal is a winning one. They should be short; the length will vary according to the complexity of the bid being summarised, but one or two pages is good, and three or four acceptable; more than that needs thinking about.

An executive summary should include the following components.

Introduction. Set the scene. Identify why there is a need for the proposal (i.e., what the client's main objectives are).

Key benefits. Benefit summary tables, such as the example in Table 4.6, help capture key benefits. You can used them to link the bid together by giving them at lower levels in the document with more detail. Support them with relevant client quotations and evidence as needed. See the next section for more about benefits.

Overview of the solution or offering. Describe what is being put forward, and show how it helps the client meet their aims (or solve the problem, if you prefer) as described in your introduction. Have a high-level figure or diagram showing how 'it' – whatever 'it' is – will work.

Why us. Reinforce the benefit statements you made earlier, and identify any UPBs (see the section on UPBs earlier in this chapter) that may apply. Make sure they understand that you can deliver, are safe and offer value for money. Again, support this with relevant client quotations or evidence.

Pricing. If required, summarise pricing here – it is often the number one decision maker, and it must be clear and easy to understand what is and is not included. Make it easy for the reader to compare like with like.

Call to action. Say what you want them to do next, to move towards convincing them to work with you. Suggest a presentation or question and answer session. That said, be sensitive to any procurement process they have already put in place. In the public sector the process is often predefined.

Table 4.6 Example of a benefit summary table

Benefit to ABCDE	How achieved
Experienced end-to-end management within the client's market will provide consistent, high-quality deliverables, saving cost	• Proven approach to quality control, having delivered similar projects globally • Quality-control approach already determined at level of individual SLAs
Consistent SLAs ensure compliance with statutory duties	• We will use the latest technologies and tools, such as our Workforce Management System

Executive summaries should finish with a call to action. Engage the reader with something you want them to do.

Benefits versus features

One of the cornerstones of proposal writing is to understand the difference between a **feature** and a **benefit**. This is easily achieved by liberal use of the 'so what' test.

> **THE 'SO WHAT' TEST – AN EXAMPLE**
>
> **Feature:** This car has an efficient heater.
>
> **Benefit:** It can keep the occupants warm in cold weather, enabling its use in winter.
>
> **So What?** The prospective purchasers live in Bahrain, and so aren't concerned about a heater. (They would prefer air conditioning.)

The example shown here is trivial, but it is an important lesson to learn. Most systems or solutions that are offered to customers have a large number of features (for example, 'it can process 50,000 transactions per second'). However, what matters is whether a feature brings a benefit to the customer.

Benefits usually come in one of two flavours: **quantitative (material)** and **qualitative**.

> **Material.** Or quantifiable, benefits are those for which you can show a 'bottom line' justification. For example, if you supply a system that allows a customer to do their work without 10 per cent of their back office staff, because it automatically matches trades to clients, then there is an obvious cost saving. This is a material benefit.
>
> **Qualitative.** Benefits are less tangible. You might have a 'widget' that allows dealers to see two sources of market information simultaneously on the same screen, instead of having to switch between the two. This makes the dealers' working lives easier, but it might not make them more productive in any measurable way.

The example in Table 4.7 illustrates the difference.

Once you have sorted out the benefits from the features, the next step is to find out which benefits are most relevant to the prospect. You do this by presenting them to the customer informally and judging the reaction. If they tell you it doesn't matter, then it is not relevant, so don't stress it.

The 'so what' test is vital for checking whether what you have is a benefit. It is also very helpful for deciding what text you should keep and what you should leave out when short of space. In fact, when writing a bid you want to make life easy for readers, so make sure there is nothing they don't need there.

Technical and solution overview summaries

In writing a technical summary, the key difference from an executive or management one is that it is reasonable to assume the audience has the specialist

Table 4.7 Qualitative versus quantitative benefits (example)

Fact	Feature	Qualitative benefit	Quantitative benefit
Top speed of 150 m.p.h.	Fastest car on the road	Glamour and excitement	Gets you there faster and so saves time
Leather upholstery	Finest Moroccan calf	Really comfortable	Lasts longer than fabric
Metallic paintwork	Six coats of paint	Colour choice	Metallic paint no extra cost
Two-year warranty	Longest warranty offered	No worries about repair costs for two years	No repair costs for two years
45 m.p.g	Economical fuel consumption	Fewer refuelling stops	Saves money
64 cubic feet boot	Biggest boot in the business	Carries huge amounts of luggage	Saves having to hire another vehicle for large loads

> It is usually much easier to make a case for a material benefit than for a qualitative one. If you are dependent on qualitative benefits, then take a lot of trouble to make clear what they are.

knowledge needed to understand it. It should still be clear and use plain language, but you need not write it for a non-technical audience.

The structure will vary with the subject matter, but typical components will include the following.

Introduction. Briefly say what the document is for, and who it is for. This defines the audience and hence the level of technical difficulty that you can reasonably include. In less complex documents you can merge this section with the background and structure sections.

Background. This can be merged with the introduction, but it is really a separate topic. It needs to cover the technical problem being solved – to state how it came about and why it needs to be solved.

Structure. Say what is where, and provide navigation information to make the document easy to use.

Options. Cover the options that you think need to be covered (based on your, hopefully expert, knowledge). Cover the best one either first or last – it's likely to be more memorable that way. Do not fall into the trap of covering your preferred option in more detail than the rest, or you run the risk of the readership dismissing it, or challenging your assessment later on. **It's usually worth including the option 'do nothing' to show why change is needed**.

Solution. A description of the key elements of the solution and how they fit together. Ideally use a high-level figure to show how the parts work with each other. Identify technical benefits (not just features) of what is being proposed.

Implementation. This might be part of 'Options' or 'Solution' if you like, but it can be sufficiently important or complex to merit its own section. It may require different areas of expertise from those required in assessing the purely technical aspects of the options or solution. It is also likely to be of interest to non-technical readers: they may not need to know or understand technicalities, but they will be interested in how long it will all take and who will be involved. Having this material separate from the technology will help that audience.

Recommendation. Based on the options considered and the solution, say what is recommended and summarise the reasons why you are making that recommendation (you will have covered them in detail under 'Options' and possibly in appendices). This is a good place to summarise the benefits (technical and non-technical) that your recommendation delivers. The wording must be clear and easy for the audience to understand, even if it is a technical audience. Keep in mind that this is also one of the sections that non-technical decision makers are likely to dip into. It should be relatively short and to the point. A simple structure could be: recommendation; key points; risks and mitigation; benefits of the approach.

Appendices. Where there is great detail, or information that is not needed in order to follow the story, it is sensible to put it in appendices (or annexes if you prefer that term – they are technically different but for most purposes the words may be interchanged). As this is a technical overview or summary, however, you might wish to consider whether such detail is needed.

Brochures. Where standard products are involved it is often helpful to include brochures along with, or in place of, appendices.

> This summary may be technical, but it should still get across the benefits of the solution, even if the points are made in technical terms.

I recommend using figures or diagrams to help when producing a technical summary. The cliché about a picture being worth a thousand words applies. If you start your summary with a clear pictorial overview of what is involved, even the technical expert will find it easier to see how things fit together and will find it easier to know where to look for more specific points.

KEY POINT

Have links to the locations where supporting detail in the rest of the document can be found. Consider using a map (maybe along the lines of a 'mind map') or an expanded set of contents in table form. The goal is to make the proposal easy to understand, even for an expert! This table is an example.

Section 2 Communications	Defines communications links, bandwidths, resiliency or backup links, topology, protocols and road map for future evolution/development, supporting assumptions and rationale for the architecture and choice of technologies
Section 3 Security	Covers physical and software security, security approach, choice of technologies, design implications and constraints due to security requirements, testing and penetration checks …
Section …	… and so on

Writing technical content for non-technical audiences
This is the counterpoint to writing technical material for a technical audience; the critical point is to get the level right. At the risk of overusing cross references, the earlier section on 'Executive summaries' also applies here. A good starting point is to decide the key points you need to get across, and then determine what technical information is needed to achieve that.

Concentrating on the results (or, at the risk of drifting into management-speak, outcomes) rather than the technology itself can help. For example, in IT, server virtualisation can get very technical, and detailing how it will be done is potentially complex, but the results can be easy to understand: fewer servers means less power consumption, and so the benefit can be expressed in terms of saving money, being greener, perhaps improving overall performance, making the systems easier to manage and so forth.

Using analogies can also be helpful when presenting the material to a known non-technical audience. Many technical issues, with a little creative thought, can be expressed by analogy with something common in everyday experience. I've often heard bandwidth for data transmission compared with water flow, fire hoses and garden hoses being regular characters.

For example, storage capacity in terms of terabytes or petabytes can be hard to grasp – even more so if you start expressing it in terms of how many noughts go after the numbers! But if explained in terms of films or music it can be more readily understood. That said, it is worth having analogies that keep a reasonable scale themselves. The ability to store, say, a thousand films means something, but if you say that you can store a billion films it gets to lose traction. **Analogies need to be in terms of things the audience can easily imagine**.

HINT

Try looking at popular science writing for examples of where complex and difficult subjects are put across in a jargon-free, easy-to-understand way. Magazines such as *Scientific American* and the recent 'Eureka' supplements to *The Times* spring to mind, as do many books written for the general public on maths, physics and so on. See the resources listed at the end of this book for more information.

CVs

When you are bidding to supply services (technical, management, maintenance and so on) it will often be the quality and experience of the people delivering them that will be the decider. The best way to deal with this is for the people who are proposed to meet with those making the decision. However, in a formal tender process, particularly in the public sector, there may be restrictions on this. More fundamentally there simply may not be time. So the way people come across in their CVs will matter a lot.

The level of detail and the specific content will depend on the readership. If they have expressed a preference as to how it should be presented then follow that. If not, and if you know what the prospect is looking for, tailor the CV to meet that. Failing anything at all that guides you, using a simple structure such as the following can be useful. Of course, if the client specifies the structure or content then you should comply with that.

Job title. What the job role is called.

Name. In full (or first name only, if perhaps this is an example CV).

Role proposed. Brief description of the role covered by job title so that it is easy to see why the proposed person is right for it, Identifying key qualities or functions.

Experience. A list of assignments and achievements (most recent first) where the named individual has gained experience that makes them suitable for the job. Include client quotes where their work has been appreciated. Focus on what was delivered and its contribution to the success of the venture. Identify the benefits of their contribution, where they have 'gone the extra mile' and so on. However, do not go over the top – you are also setting expectations, and we all know that not everyone is a genius. It must be credible. It is not always necessary to name the employer or client involved (in the latter case you may need client permission before you do so).

Education and qualifications (if asked for or needed). Detail significant and relevant qualifications only (not down to the last GCSE or swimming certificate). Include, for example, university degrees and relevant technical or professional qualifications and training only.

It is worth noting that a CV to go in a proposal is not the same as the more familiar job application one. You would not expect to include personal information such as age, address, contact details and so forth. Nor would you expect to include employment history, interests or hobbies and the like. The purpose of a CV in a proposal is to demonstrate that you have people available with the relevant knowledge and experience needed to deliver what you are offering. You are selling the capability, not the person. Of course, where the role extends into team working, managing people, training and so on there would be more about the person – more focus on soft skills, but still from the point of view of capability.

Indeed, where generic roles are being described with 'representative' CVs you would not even include a name.

NOTE

Where security clearance (or similar) is required it may be necessary to give personal details or evidence of clearance.

Present all the CVs in a consistent way. If there is a house style, then follow it as far as it is compatible with the client's needs. Adopt a simple structure and keep it short and focussed.

HINT

Do not use photographs with CVs unless it is mandatory. They distract from the content and lead people to prejudge the candidate on visuals alone. Small, badge-like shots also tend to make everyone look vaguely suspect – the 'passport' phenomenon.

CASE STUDIES AND REFERENCES

Clients often ask potential suppliers to give examples of where they have done similar work before. This is where they can go for an independent assessment of your ability to deliver. Case studies and client references fulfil this function.

Case studies

Case studies have a similar role to CVs in that they present the experience and track record of your organisation to deliver what is being proposed. They also allow you to show where you have met or exceeded a client's requirements, ideally with a quotation from the client to reinforce the message. As before, if the customer has specified a format then you are advised to use it; if not, then what follows is a good start.

KEY POINT

When naming a client make sure they are happy to be named and grant you permission to use any logo or branding material before you include it in your bid. Sometimes you may find you need to use anonymous case studies where you refer to the client generically, for example as 'a telecommunications supplier'. If so, then you need to make sure you do not include information that makes it too easy to identify the client.

Introduction. Set the scene by describing the problem or situation and the results the client was hoping for. Give the relevant dates, values, timetable and so forth. Make it easy to see that this relates to what your client is looking for. Include the client logo if permitted.

Scope. Describe the scope of the project – what was and was not included. Make it clear what your organisation's role was, especially if working in partnership with other organisations or teams.

Solution. Define the technology, approaches taken, tools used and so on. Do not go into too much detail (unless specifically asked for). Use high-level figures where helpful.

Benefits or outcome. Identify what was achieved and how it benefitted the client. In particular, identify where you exceeded expectations. Support this with a client quotation if available – this brings it to life and adds credibility.

Contact (optional). This is only needed if the case study is also serving as a reference. Make sure the organisation or person is happy to be listed here. Suggest that the contact is via you if you wish to keep a level of control of timetable and so forth.

KEY POINT

Unlike CVs, case studies often benefit from figures or pictures, to bring them to life and make them interesting visually. They will probably need to be relatively small (depending on the space available), so they do need to be carefully chosen. A 5 cm square picture can only get a limited amount of detail across.

References

As a technical expert you are unlikely to be involved in the sales side of choosing references: arranging visits and so forth. However, you are likely to know which current or past clients use the technology that you are expert in. So you may find that you need to write up the reference for the proposal.

Essentially this is much the same as a case study, which is why I've included it in this section. By default you would write it up as a case study and then add in contact details so that the prospect may get in touch. You might ask that they let you know which references they will take up. As with a case study, you need to make sure the client is happy to be used as a reference. In addition, you need to research what they really think of you, and find out the logistical details regarding how much notice they want before a site visit. You should also make sure that your organisation is happy to use that client, too, and what restrictions are considered necessary.

LEGAL CONSIDERATIONS

This section covers, for example, the use of words such as 'ensure', 'includes' and so on.

A consequence of 'define and persuade' (see Chapter 2) is that what you put in your proposal can have legal significance. Sometimes this is made explicit by the procurer; they will state something along the lines of: 'The accepted version of the proposal becomes a contract schedule.' This creates a real dilemma, since the language of persuasion sits uncomfortably with the requirements of a contract schedule. I have yet to be convinced that this is the 'best practice', and consider that having specifically drafted schedules (or standard terms and conditions) is a better approach once the principles of the deal are agreed.

The bulk of the potential problems come from open-ended commitments and poorly defined scope. This is a particular concern where the language is interpreted in legal terms. For example, the word 'includes' when associated with a list of deliverables is interpreted as 'but not limited to'. Adding 'etc.' causes similar problems.

Where you know that this legal schedule approach is to be used there are some things you can do that will help avoid the worst pitfalls. The list in Table 4.8 is by no means perfect, but it is a good starting point and will get you thinking along the right lines.

Ultimately, where the proposal or parts of it become contract schedules the only safe solution is to have a suitable professional expert review the wording. This is both time consuming and expensive, so it is best left until you get to the contract negotiation stage of the procurement. You can help the expert by following the guidance offered in Table 4.8, which will get rid of many major pitfalls.

WRITING CHECKLIST – A SAMPLE STYLE GUIDE

I've often produced something like this as an A5 laminated sheet, for larger bid teams to use as a reference card.

Ten points to remember

- Remember the core themes for your bid – for example, 'credible', 'sustainable', 'value for money'.
- Express material so that it is relevant to the client. **Answer the question!**
- Write easy answers early – if you can, do it now.

Table 4.8 Some legal considerations in proposal writing

Words, phrases or constructs to avoid	Why they are a problem	Alternatives
Best practice	This implies that you will continually adopt what will be changing best practice – at your cost	Define the standards, and version, you will use. The slightly weasel-word solution is to say 'aligned with' such and such a standard
Best endeavours	You are required to do everything conceivable to guarantee a result – you have unlimited liability	Use 'reasonable endeavours'
Ensure	This can imply unlimited liability when it is part of a contract. 'Ensure' means you must make it happen. It is risky since, in reality, you cannot ever ensure anything 100 per cent	'Deliver', 'supply' and so on can be used instead. Change 'we will ensure that all monthly reports are delivered by the 3rd of the month' to 'monthly reports are scheduled for delivery on the 3rd of the month'
Unrestricted lists	When you say 'includes' it means 'not limited to'	Use 'comprises' instead of 'includes', and do not have any items that end with or imply 'etc.'

- Keep sentences short when you can. Journalists motto: 'Make it short, make it snappy, make it up?' (Well, not the last bit.)
- Keep to any page and word count limits at all times.
- If a word isn't needed, cut it out.
- Use positive language – 'the <organisation name> will …'; avoid 'feels' etc.
- Don't use marketing speak.
- Break up text with diagrams, tables and pictures – don't write if you don't have to!
- Read it aloud when you have finished. If it doesn't read right, it isn't written right.

For themes, choose something that links your organisation, the client and the bid.

Finally, remember

Fact – feature

Benefit – 'so what?' test

Use benefit/how achieved tables where appropriate.

- Singular versus plural
- It's means 'it is'; its means 'belonging to it'
- SLAs not SLA's

Answer the question the customer asked, not the one you wanted them to.

5 GETTING INFORMATION FROM EXPERTS

Number Six: 'What do want?'
Number Two: 'Information.'
Number Six: 'You won't get it.'
Number Two: 'By hook or by crook, we will.'
The Prisoner, Patrick McGhoohan, TV serial 1969 (slightly misquoted)

AT A GLANCE

- getting information from specialists whose skills or knowledge are different from your own;
- who writes what;
- strategies for gathering material;
- what information might be needed.

INTRODUCTION

Writing is not something that everyone finds easy, and writing for sales proposals can be harder still. Most bids have tight time constraints, and, as I have said before, the experts who have to contribute frequently have other, 'real', jobs that are supposed to take up all of their time in the first place. Although this book is primarily aimed at experts called upon to write bids about their own subjects, it can happen that such experts will need to draw upon the knowledge of others, either in their own discipline or in different ones needed to complete the response or to put it in a broader context.

SPECIALISTS AND EXPERTS INVOLVED

Before we consider how best to get information from the various experts, it is worth considering which experts you may need to deal with and what information you may need from them. I have framed this in terms of what they would be expected to deliver within a bid.

NOTE

The term **subject matter expert** is frequently used to mean a specialist, and is sometimes abbreviated to SME (not to be confused with 'small or medium-sized enterprise').

Sales staff

Sales staff have the primary responsibility for winning new business and retaining existing business. They will own the relationship with the client and usually have overall control of the 'selling proposition'. They will be major contributors to the strategy used to win the business and know such things as what the client is looking for and what a winning price might be.

The following deliverables typically require contributions from sales staff.

Sales strategy. The approach to be taken in order to win the business.

Sales themes. The themes that need to be communicated to the client to support the sales strategy.

Pricing. Conversion of cost and financial options into the price needed to support the sales strategy.

Written contribution. Executive or management summary; client quotations and reference site material.

Project managers

Typically project managers are responsible for delivering:

- the project plan for implementing the client's requirements;
- any documentation on methods and standards that relate to project management;
- risk plans;
- any assumptions and constraints that would apply.

The project manager is also a source of cost information (as opposed to the price or budget the client has in mind).

The following deliverables typically require contributions from project managers.

Project plan. A project plan to the level of detail required by the client, together with a sufficiently detailed internal plan to allow project costs to be estimated as reliably as possible, and an assessment of the accuracy of any such estimates (any plans must be in line with appropriate quality standards for project management, such as PRINCE 2, for either the client, the supplier or both); assumptions, constraints and so forth.

Risk plan. Risk management documentation for the products and services to be supplied to the client, highlighting any that also imply risk for the bid.

Written material. Narrative to support the project plan, risk and change processes and methods, and evidence of how similar projects have been implemented in the past.

Technical specialists

These are often industry- or technology-specific. For instance, in information technology, technical specialists might include system and database designers, networking specialists, capacity planners, solutions architects and so forth. In the water industry the list might include civil engineers, water processing specialists, hydraulic engineers, architects and the like. These people all have something in common – they are specialists in what they do, but not necessarily in selling it to the client. They will contribute to the design of whatever is to be delivered to the client. Also, they often have existing clients to keep happy – people actually paying fees. These fee payers, rather than the proposal, are likely to be their priority. It is important to be sensitive to this and to make sure a reasonable compromise can be achieved.

The following deliverables typically require contributions from technical specialists.

Design. Overall technical design of what will be proposed to the client, to a level of detail that allows it to be costed and evaluated by delivery staff as a viable solution.

Performance. Specifications relating to the performance, capacity, expandability and so forth for the solution proposed to the client.

Equipment requirements. Specifications (in part to support costing) for equipment and plant to be supplied as part of the solution; any environmental requirements to allow buildings or premises to be identified.

Development requirements – technical constraints. Any constraints that apply to the solution, particularly any that impact the client directly.

Development requirements – risk. Identification of any areas of risk that arise from the proposed design, for example, use of leading-edge, untried technology.

Written material. Narrative that describes all of these and says how they will be used to deliver the customer's needs; client quotations and reference site material.

Implementers

These people are complementary to the technical specialists in that they are in the operational rather than the design side of the business. While they may or may not have the skills needed to define the solution, they will know what has to be put in place in order to make it work. Again, they will have other calls on their time; in fact, they are quite likely to have a full-time job with an existing customer, so their time will be the hardest to obtain. However, experience shows that their input will be highly valued by the client. Demonstrating a clear understanding of what is needed to make the client's business run smoothly will make a very positive impression.

The following are deliverables that typically require contributions from implementers.

Operational solution. Contribution to any operational design, including logistical, staffing, reporting, service-level and other issues.

Cost drivers. Staff and premises required to run the solution after delivery.

Risk. Areas where there is perceived operational risk.

Written material. Narrative that describes all of these and says how they will be used to deliver the customer's needs; client quotations and reference site material.

Finance and commercial specialists

The commercial specialists will normally have both a contributory and a reviewing role in the production and pricing of the bid. Finance will be a source of information for any cost modelling and will normally be involved in any financing deals, currency deals, leasing, discounts, margins and so on.

The following deliverables typically require contributions from the finance department or commercial specialists.

Payment schedules. Comments and suggestions relating to client-proposed schedules for payment, costs associated with them, alternative suggestions for funding and related issues.

Leasing options. Finance deals available to underwrite the business or make it easier for the client to afford, with more favourable cash flow and so forth.

Cash flow forecasts. Financial modelling of how the business will run once the client has given the go-ahead.

Cost information. Raw cost information such as daily rates for staff, cost of office space and services, purchasing equipment and so on.

Credit information. Whether the client and any subcontractor is creditworthy.

Financial reports. Annual report information such as trading profit or loss.

Written material. Narrative that describes the proposer's pricing and any conditions associated with it.

In some organisations the finance and legal departments have a combined function, and there may be 'commercial' specialists who will work with a bid team providing both types of advice.

Legal experts

The situation here is much as for the finance department. The legal experts will be involved in reviewing and drawing up terms and conditions. In some cases there will be a very significant input from, and interaction with, the legal department. This is particularly true of government business, where the contract can be as big as the proposal itself, with literally dozens of schedules to the main contract.

The following deliverables typically require contributions from legal specialists.

Contract and schedules. Analysis of client terms and conditions, with comments on what is acceptable or unacceptable; advice on drafting supplier terms and conditions, contracts for subcontractors and all other legally binding relationships within the sphere of the bid and ultimate supply to the client.

Risk. Any risks to the bid (for example, the time it will take to review the contract may be too long) or the client offering from a contractual point of view.

Written material. Narrative that describes the proposer's terms and conditions; commentary on any legal contracts or schedules.

Changes to terms and conditions can have significant impact on the risk involved in the business. It is important to have a reliable legal opinion – don't be tempted to depend on an amateur view. For example, there is a significant difference between 'best endeavours' and 'reasonable endeavours'. Chapter 4 contains some guidance on this, but if you don't know, consult an expert.

Other internal departments

In addition to the legal and financial departments within your organisation there will inevitably be a number of others that need to be satisfied with and to contribute to a bid. Most commonly the list will include human resources (HR) and quality assurance (though that function might also be delivered by the project management authority). It may also include the marketing department (for example, for information about corporate social responsibility policy, product promotion and so on).

The following deliverables typically require contributions from other internal resources.

Employment policies. Training, health and safety.

Health and safety. Evidence of compliance with regulations.

Personnel information. Numbers of staff employed, and representation of ethnic minorities and disabled in line with, or better than, any government regulations (where TUPE applies – Transfer of Undertakings on Pension and Employment – e.g. in outsourcing deals, the HR input will be significant).

Corporate information. Contribution to local charities, investment in local community and so on, environmental policies, security, data protection (the list is extensive, and you may need to research exactly where in your organisation the information sits).

Quality policy. Documentation and certificates relating to any formal accreditation (for example, ISO 9001); copies of quality policies and procedures as required.

Quality standards. As above, documentation relating to standards; also information on compliance with third-party standards, what they mean, cost of compliance and so on.

Written material. Narrative that describes any and all of these (this can be a significant part of any public-sector proposal); internal staff quotations and case histories concerning treatment and development of staff.

Senior management

Senior management is principally involved with approval and support, acting as a sponsor or champion for the bid. Managers may also be needed to write high-level supporting material.

The following deliverables typically require contributions from senior management.

Bid approval. Providing the necessary sign-off so that the bid can be delivered to the client.

Support. Contributing to the bid by being available for presentations to show commitment, writing covering letters supporting the bid, and promoting visibility of the company at high levels both internally and externally.

Written material. Statements on high-level policy; explicit commitment to the bid; demonstrate the importance of the organisation to the client.

STRATEGIES FOR GETTING INFORMATION

I have found a number of strategies that have worked well when obtaining information from the busy, the stressed and even the unwilling has been required. However, they won't all work with every person; you need to match the strategy to the person and the situation. To help you do this I have supplied a list of strengths and weaknesses for each strategy.

HINT

If you want to get a meeting to run as quickly as possible, then have the participants stand for the duration (assuming they are able to).

The strategies covered here are:

- journalistic interview;
- workshop;
- questionnaire;
- straw man;
- model answer or template.

They all have plusses and minuses in terms of who they work best with, the amount of time and effort involved, and the type of information they are best suited to. I have tried to cover not only the strategy itself but the preparation needed.

NOTE

These strategies can be used for any information-gathering exercise – they are not restricted to helping with proposal writing.

The journalistic interview

This is where you sit down with, or call or teleconference, the person who has the information you need (one-to-one, ideally) and ask questions so that you can write up the response needed by the client.

Preparation

Define what you need to know and when you need to know it by. This may seem obvious (it is), but – just as many people have been at meetings where there has been no agenda – I have been interviewed myself by interviewers who didn't seem to know what they wanted and needed much prompting.

Brief the interviewee in advance. The briefing needs to include:

- **Any background information they need.** Typically any requirements or tender documents from the client and any specific questions you want them to answer or contribute to.
- **The scope and subject area of the information you need.** So that they have the chance to confirm or deny that they are the right person to ask (in a large organisation you may find that you have been directed to the wrong person).
- **Logistics of the interview.** When, where, who, how long and by what method (e.g. in person or by phone, in whose office, and so forth).
- **Timetable for response** (arguably part of logistics). Getting across the overall urgency (it usually is urgent) helps the interviewee focus on and understand your problem.

For yourself you need to define what the key points are that you must cover for the interview to be deemed a success; essentially, what is the minimum information you need to get?

Approach

This is not a political or adversarial interview; you are on the same side. You are not trying to catch them out or make them admit or commit to something against their will. You are helping them to tell a story.

Pros and cons

Journalistic interviews are useful for:	They are not so good for:
• people with limited time – those who have to fit in contributing to a bid while already busy doing a full-time job; • those who dislike sales-related activities on principle or because of prejudice; • those who prefer the spoken rather than the written medium (you take notes, write it up and then get them to review it afterwards); • those for whom English is not their primary language (meeting in person, one-to-one with no interruptions, gives the best chance of sorting out any communications issues).	• material that requires in-depth technical documentation and significant cooperation or workshop time with colleagues and peers to get the answer completely correct; • those who like to write their own material; • people in incompatible timezones or locations.

The workshop

In many technical/complex procurements answering a question can often mean developing or identifying a solution.

Preparation

Compared with a simple interview there is quite a bit of work involved in setting up a workshop session. As with the interview you will need to supply:

Any background information they need. Typically any requirements or tender documents from the client and any specific questions you want them to answer or contribute to, plus a clear brief, in advance (at least a day) covering the problem and the background.

The scope and subject area of the information you need. So that they have the chance to confirm or deny that they are the right people to ask (in a large organisation you may find that you have been directed to the wrong people).

Logistics of the workshop. A room or other venue where you will not be interrupted; someone to run the workshop and act as recording angel; the people with the required knowledge; plenty of time to allow free discussion; someone who knows how workshops should be run (the resources section at the end of this book includes links and suggestions for where to find out more about this; you can hire people to do it for you, which gives the added benefit of impartiality – bosses often make a poor fist of this role, as they tend to dominate rather than facilitate).

Timetable for response (arguably part of logistics). Getting across the overall urgency (it usually is urgent) helps them focus on and understand your problem.

HINT

Use a digital camera to capture everything written up on the whiteboard or chart before it is erased. This also saves on writing-up time.

Approach
Workshops are a very effective technique for dealing with higher-level questions such as: 'What is your approach to business continuity for a multi-site international organisation, and how might you use this to reduce costs?' The client's requirements can cross many areas of knowledge and expertise – you might consider security, communications, data centre rationalisation, virtualisation, hours of operation, required service availability, testing and verification, scope of service and many other issues. One person may not be able to answer it all; in addition, having different perspectives on the problem can lead to creative, innovative ideas that can positively benefit other aspects of the solution outside the original scope.

Pros and cons

Workshops are useful for:	They are not so good for:
• developing a solution or defining the question to be answered; • creativity and innovation; • identifying all the issues, risks and opportunities relating to the topic.	• people without the time to spend on the activity because they are heavily committed elsewhere; • those unused to workshops; • those without an experienced facilitator to make the workshop effective; • focussed, fast results.

The straw man
This technique, where you put forward a suggestion or possible solution that is perhaps too simple, lacks detail or clearly won't work, is primarily a technique to get debate going. You will require a degree of specialist knowledge in the relevant subject or technology in order to do this. You might well use it within a workshop. Its main value is in providing a starting point if people are sitting around thinking (hopefully) about the problem, but not actually getting going and producing anything.

CASE STUDY

The proposal under consideration concerned a technically complex outsourcing deal, which needed an overall solution for the elements of the bid to hang off. The technical questions had been allocated to suitably qualified and experienced specialists, but none of them were writing anything. They all said: '… not sure where to start, as my bit depends on …'

These people were located in widely spread, internationally diverse offices, and the project lacked a solutions architect responsible for the whole service. There was a reason for this: that resource would only be available when the bid had reached a later stage. To get to that point something was needed 'now', and the sales lead chose to create a solution diagram containing the key components (essentially the ones the client had asked questions about), based on a similar, but not the same, solution used for another client. This was circulated and kicked off considerable debate and input ('That's wrong, it couldn't work like that here.') and enabled something good enough to support writing the answers. The collective knowledge was greater than the sum of its individual parts. It also got people writing their responses rather than waiting for a perfect world. It was successful in getting the organisation to the next stage of the procurement.

Approach

Don't spend too much time designing every detail of your 'straw man' – it only needs to be complete enough to get things going. If you know an answer in all its detail you probably are the expert who is needed to start with – though it would still offer a sanity check.

Pros and cons

A straw man is useful for:	It is not so good for:
• starting and encouraging debate; • providing a framework to work within; • focussing the direction of travel.	• getting a quick result; • cases where you need a completely blank canvas; • those who are uncomfortable with debate or argument – it tends to be controversial.

Model answers

This is very helpful where you have a number of similar questions to answer, although they relate to different topics. For example: 'Describe your outline solution for implementing security for mobile devices (1 page).'; 'Describe your outline solution for backup of remote user data (1 page)'; … There are many variations on this theme, and in the more complex procurements broad questions are then supported with similarly structured detail questions. When you answer these it helps if the responses have a consistent look and feel and a similar approach. More importantly this is an opportunity to save time – something there is never enough of when writing bids.

Having model answers on which experts can base their bespoke answers can deliver real benefits by:

- providing a structure that makes presenting benefits more effective;
- presenting a consistent image and approach;
- making it easier for the experts to write their responses – saving time;
- delivering answers that pass the 'answer the question' (ATQ) test and increasing evaluation scores.

It is worth taking the time when you receive the client's invitation to tender (ITT) – or whatever the document happens to be called – to review it and identify any areas where model answers will help. You can then use experienced staff, possibly working with a specialist author, to produce a client-specific, high-scoring answer (or an answer template).

A classic case where a model answer is useful is the CV. You really want them all to look the same, have the same structure and show that you all belong to the same team.

Golden rules

Always make sure that the questions you are answering are really close enough in form to fit the model. 'Describe your approach to implementation …' may not be the same as 'Describe how you would implement …' The former is likely to be about your overall methods; the latter is likely to be asking for a specific set of steps you would follow to solve their specific problem.

ATQ always applies.

Preparation

You will need to supply:

Any background information those involved need. Typically those requirements or tender documents from the client that would benefit from a model answer.

The scope and subject area of the information you need. So that the authors have enough information to use the model answer in conjunction with the question they are responding to.

Logistics. Distribution of model answers and briefing to those who need to complete them, with a timetable and a mechanism for response (e.g. instructions for email communications, or a specified format for the document or for replies).

Timetable for response (arguably part of logistics). Getting across the overall urgency (it usually is urgent) helps authors focus on and understand your problem.

Approach

The model answer needs to be flexible enough to allow for different authors and topics, but must also have enough structure to give a common look and feel and the sense that all the answers come from the same organisation.

Even when using model answers the writing style can, and should, vary according to the different audiences that will read the resulting documents.

Pros and cons

Model answers are useful for:	**They are not so good for:**
• maintaining a consistent approach; • creating a consistent look and feel and approach to writing style; • cases where there are many similarly phrased or structured questions.	• cases where all the questions are very different in style and substance, when you may take more time on the model than you save overall; • very different audiences reading the end result (check whether they are so different as to make the model answer inadvisable – which is rare); • cases where the target audiences for the answers are known to have wildly different style preferences – for example, one subject area assessor might be known to have a marked interest in background detail and ‘seeing your workings’; another might want key bullet points saying just what you will deliver. In this case a model answer won’t help.

Where a model answer is not helpful, you can still benefit from having a simple writing style guide that nudges the experts in the same literary direction. The resources at the end of this book include some examples and references that might help here.

CASE STUDY

The following list was provided for a client producing a very large proposal involving many experts working in widely different technical areas. It provided a model structure and general guidance that allowed the diverse experts sufficient scope to write in their own styles for their own audiences but still produce answers that read as though they were part of a consistent approach.

What. First, what we are going to do – don't make them wade through the answer to find out; cover the benefits to the client.

How or when. How we are going to deliver it; when we are going to deliver it.

Where. Evidence to support our bid; references etc. – show we have done it before.

(Why). Optional in many cases – only explain why if there is clear benefit to be gained (for example, if the why sets us apart from others).

BOILERPLATE VERSUS MODEL ANSWERS

Many organisations put great faith in having a stack of pre-prepared answers, typically ones used before in previous bids. This can be a useful time saver if done in a very sophisticated way within a controlled and maintained environment, but not necessarily if it just consists of copies of the old bids without any guidance as to the result achieved (good or bad).

There are real dangers in basing answers on **boilerplate** material, in other words generic answers or statements that you simply cut and paste into every bid document you submit: the material can be stale or not directly relevant to the question and may not be spot-on for the client. As outlined above, where there are similar questions such as those that ask you to 'describe your approach to XYZ', there is scope to make use of model answers. But these must be tailored to the specific bid and provide a basis for providing effective and cohesive sales copy.

The questionnaire

In 25 years of working on bids I have only seen this technique used once. It is last in this section because it is the least likely approach, but it just might be helpful.

A questionnaire can be helpful where you are seeking opinions rather than a detailed answer to a specific question – for example, where you need an expert to gather information before they can produce the answer. I have only come across this once, and that was a rather special case where the target users (members of the public) needed to be surveyed to establish their needs. It is included here more for completeness than for any other reason – few readers will need it, but for those who do this section will save time. In practice you would expect the expert to do it for you!

Preparation

You will need to supply:

Any background information those involved need (though this depends on defining the target group first). Typically any requirements or tender documents from the client and any specific question you want them to answer or contribute to.

The scope and subject area of the information you need. So that you can determine the scope and structure of the questionnaire.

Logistics. Someone (if not you) who knows how to structure questionnaires, and support for producing, distributing, collecting and chasing them (either physical or electronic).

Timetable for response (arguably part of logistics). Getting across the overall urgency (it usually is urgent) helps the audience focus on and understand your problem.

Approach

Potentially time consuming to prepare, use and analyse, the questionnaire is unlikely to be your first choice. In fact it is more likely the last resort.

Pros and cons

Questionnaires are useful for:	They are not so good for:
• gathering opinion about something not cut and dried; • collecting information to provide the starting point for an expert to work from; • validating an opinion with supporting data.	• something that needs to be done in a hurry; • cases where you need a very specific question answered.

SUMMARY

Getting information from others requires that you understand their constraints and the basis of their contribution to the bid. You need to recognise that they are just as busy as you are and that, like you, they may be people for whom sales writing does not come naturally. So help them as much as you can – the easier you make it for them to contribute, the more likely you are to get the information needed. Choose a strategy that fits best with their needs and way of working.

6 EDITING AND REVIEWING

I can't write five words but that I change seven.
Dorothy Parker

AT A GLANCE

- editing and reviewing your own and other people's material;
- more on grammar, abbreviations etc;
- administrative considerations such as document control;
- supporting presentations;
- use of technology for collaboration, reviewing and sharing documents;
- checklist.

INTRODUCTION

For many reading this book (assuming they are within the target audience), having to write proposal text is bad enough. However, there is a good chance that once you start doing this you will get dragged into editing material written by others. They may be your coworker technical specialists, specialists who work for you, specialists in other areas or simply those who were less able to escape the writing chore. This chapter is for you and gives advice and guidance on editorial work. It can also be useful for editing your own work; if you can distance yourself from what you have written, maybe by putting it aside for a few hours, then the techniques here should deliver improvements.

Although this chapter builds on the material in Chapter 3, I have tried to keep repetition to key points or useful additions only. Where there is repetition it has been done so that this chapter can more or less work on its own without the need for too much cross referencing.

The role of an editor has been liberally interpreted here. Anyone who is familiar with it from a publishing environment will have a somewhat different view. No mention is made of proofing marks, since it is assumed that the editor will work online. This is what happens in bid environment.

EDITORIAL WORK

The role

The most important ground rule for anyone undertaking, or having thrust upon them, an editorial role is to have a clear definition of what is to be delivered. The role of the editor should **not** be to write the bits of the proposal that have been forgotten, or not delivered, by sales staff, senior management or anyone else. It **does** include:

- identification of what is missing;
- ensuring that the document meets any style guidelines;
- checking spelling;
- getting the proposal ready for production.

If you find you have become the editor-in-chief for the proposal by default, make sure you get your role agreed and understood, or you are on a hiding to nothing.

KEY POINT

When editing don't forget the 'Good advice' questions from Chapter 4:

- What is this document for?
- Who will read it, and what do I want them to get out of it?
- Do I have all the information needed to write the document?
- Is it really needed?

Why is editing needed

This longer than usual case study gets the point across.

SITUATION

BS Ltd had to submit a proposal for the supply of security equipment to NB plc, a group that operated office and warehouse facilities. In addition to the equipment itself, mainly surveillance cameras, the proposal had to cover installation, relocation, maintenance and consultancy on the appropriate type and location of equipment for any specified building.

BS had two separate departments that supplied equipment and offered operational consultancy. It provided the maintenance and installation services via a subcontractor. The sales manager, Jimmy C, split the requirements document that came from NB into the three parts that related to these areas and passed them on to the relevant departments and the subcontractor. Jimmy intended to collate the three documents together, write a management summary, and build a price based upon the quotes from the departments and the subcontractor.

PROBLEM

When the individual sections came back to Jimmy it became horribly clear that they weren't going to dovetail smoothly together. To start with, each writer had used a different font, type size and margin setting. They had also used different headers and footers, numbering and heading styles. Visually the documents looked very different. There were also huge differences in writing styles. The subcontractor had taken a very 'friendly' approach and had used 'you' and 'we' all over the place, and had also adopted an eccentric numbering system. The two departmental contributions looked more alike, but very different writing styles had been followed. In addition, one department had two levels of numbering and the other had five – what was a high-level heading in one document was a low-level one in the other.

The formatting problems for the overall page layout were not too great a problem – Jimmy was able to cut and paste into a template document. However, the nature of the word processing system meant that he had to go through all the headings one by one to change them to the correct style, which took a considerable amount of time. There was little time left to do much more than this if the pricing and management summary were to be completed.

In the end it was a matter of fixing as much as possible, writing a management summary at the last minute and hoping for the best. The only thing that looked good was the price! Jimmy hoped that it would be low enough to save the day.

OUTCOME

The delivered bid looked, and read, like what it was – a badly assembled patchwork quilt. Because there was so little time available for the editorial task there wasn't time to do much more than get some of the fonts consistent and put the page breaks in the right places. The writing styles were completely inconsistent, and, of course, the sections did not reference each other (an additional issue was the lack of an overall sales strategy). Furthermore, each section had been numbered differently and used completely different styles for headings, captions, titles, legends and so on. Although the raw information was actually quite good, the poor presentation and inconsistencies made the clients worry about quality standards within BS. They didn't feel they wanted to trade with such a company. Even the low price was not enough to sway them.

LESSON LEARNT

The key point was not to leave the editorial work until the last minute. The amount of work that would have been needed to do a good job on the randomly produced components of the final bid could easily have kept an entire team busy for over a week. Jimmy had one day! If document templates and writing guidelines had been produced at the beginning, maybe with a skeleton document for the contributors to populate as a starting point, life would have been much easier for Jimmy.

What is involved in editing

For a proposal, editing covers quite a variety of functions over and above what might be described as copy-editing.

Person

This sounds technical but isn't. Person refers to point of view: the first person is yourself – we, me, us and so on; the second person is you (and yours, etc.); the third person is he, she, them or they, and so on.

Ideally this detail is part of a style guide, but if it is not then it is worth getting everyone writing to agree to use the same style for it. I used to recommend the third person for most bids: 'ABC Ltd will recognise the benefits of the proposed solution' or 'NB Ltd expects that DEF plc will welcome our approach …' It is clean and formal.

However, it has become more common to use a 'warmer', more personal tone. For example, 'You will recognise the benefits of the proposed solution' or 'We expect that BS plc will welcome our approach …'

NOTE

See also the use of singular and plural here; an organisation is singular.

Whatever 'person' is used should be consistent for the whole bid unless there is a conscious decision to target different audiences by using a different style in some sections.

Spelling

Getting the spelling right and consistent across the whole bid is important. If you control the whole document then you should make sure this happens (or that someone else is doing it). If there is a style guide, then that should cover what you need to do. If it doesn't, then ask; if there is nobody responsible then you need to do it for yourself.

Spelling checkers have made this easy, and there is little excuse for getting it wrong, though there may be snags with them if they are not geared up to the version of English in use in your country. Many default to the United States version of English, which, for example, spells colour incorrectly (if you are British) as color. Another problem that is surprisingly common, and that gives the impression that the writer is totally illiterate, is missing out the apostrophe in condensed words: for example, cant instead of can't, or wont instead of won't. Assuming your application supports it; choose the correct version of the language for your bid.

For specialist sections you may find you need to add words or acronyms to the 'custom' part of the spelling checker. If you do, make sure you get it right or you risk getting it consistently wrong throughout the bid.

A spelling checker will fix most spelling errors. However, there will be some it does not detect – in particular, the use of the wrong word, such as there instead of their. To detect this kind of thing you need to read documents, to see if they make sense. Again, this is why it can be very difficult to proofread your own document.

Grammar

Many applications offer grammar checkers, though they are of variable value and can also be language-version specific. However, they can be helpful in detecting where a correctly spelt but wrong word has been used. Treat them with caution, but where they flag something up it is worth investigating.

If you are in doubt about grammatical points see the resources listed at the end of this book for further help. Of those, *The Plain English Guide* and Fowler's *Modern English Usage* spring to mind.

For the most part, when you are in a hurry remember that this is a bid, and do not get too tied up reaching for perfection. For example, as long as your lists are consistent it probably doesn't matter whether they are correct to the last semicolon.

KEY POINT

With grammar, knowing your audience matters quite a bit. If you are writing for an individual, or a profession, that is grammatically picky then get it right. I speak from experience.

Common mistakes

There are some mistakes and style issues that come up time and time again in every bid or (to be honest) most business writing. The 'Writing – the basics' section in Chapter 3 covers these, but the following pages illustrate some aspects of them again, firstly to remind you what to look for and secondly to offer additional examples. The areas to look out for include:

- apostrophes;
- acronyms;
- singular and plural;
- lists;
- sentence length;
- vocabulary.

I've provided additional points for some of them here.

Abbreviations and acronyms

Bitter experience has shown that no matter how well rules are defined for abbreviations, acronyms and so forth, many people will still do their own thing. One strategy is to correct the first draft of each person's documents and then send it back to the author for further work, asking them not to change acronyms and abbreviations. This helps – 90 per cent of the time they will not get changed.

At the same time, compile all the acronyms and abbreviations into an electronic file so that they can be used for easy reference or given to authors as a starting point.

If this file is kept in alphabetical order then it will provide a useful glossary that may be included with the bid.

Even if a glossary including all the acronyms and abbreviations is included within a document the golden rule is to expand each short form the first time it is used in a standalone part of a document. For example:

> The current weather at an airport is obtained from a Meteorological Airfield Report (METAR). You can get a METAR on the internet.

You can usually add acronyms and abbreviations to the dictionary used by the spelling checker in your word processing application. This can save time, as it means that the abbreviations will be sorted out at the same time that the spelling is checked.

Logos, company names and trademarks
Like acronyms and abbreviations, these need to be used consistently. You also need to make sure they have been used in accordance with any restrictions imposed by their owners. Where possible; always get permission before you reproduce a logo. With trademarks it is usually sufficient just to recognise them: for example, Microsoft Excel™. However, be careful to make sure they are reproduced accurately. Check to see that the same version of each logo has been used throughout the proposal.

KEY POINT

Don't aim for anything more than consistency within your own proposal. One of my customers never managed to have consistent rules for how its own name should be presented. Some of its standards specified uppercase, some specified a capital letter followed by lowercase, some specified bold type, and so on. All these standards were current and approved, and none were consistent – so if the customer can't do it, your chances are limited.

Singular and plural
Limited companies (and plcs) are singular: 'ABC Ltd is a leading supplier of XYZ'. Do not say, 'ABC Ltd are a leading supplier'. This is most often done in a follow-on sentence where the company becomes 'we'. For example: 'ABC Ltd is a leading supplier of XYZ with many years' experience. **We** are familiar with the MNO market …' It would be better to say: 'At ABC Ltd, we are …' Then it is OK to carry on with the 'we' form from then on in that paragraph or section.

Another issue with plurals concerns which word should be made plural in a sentence. The classic, but unhelpful, example refers to Courts Martial as the plural of Court Martial – the courts being plural, not the type of court. If in any doubt simply ask what it is that is plural; it is usually obvious.

Finally, make sure that the verb and the noun agree. Either both of them should be singular or both should be plural. For example: 'The Prime Minister **is** out of the country. The spin doctors **are** on holiday.'

Long sentences

It is very easy for people writing bids to get carried away and write very long sentences that are almost like streams of consciousness. If you are editing others' words then you have the opportunity to reduce sentence length (in Chapter 4 I recommended 16 words, give or take a handful). Look at the following example of a long sentence.

> A key benefit of the BS solution is that it allows NB Ltd to reduce the time it takes to sign up a new customer to its property management service to two hours, thus enabling them to gain 24-hour security and maintenance provision paid for through a single monthly payment.

A shorter, better, punchy version is as follows.

> Adopting the BS solution will provide NB with the ability to sign up customers to its property service in under two hours. These customers will then benefit from:
>
> - 24-hour security;
> - 24-hour maintenance;
> - a single monthly payment.

The sentence has been shortened, and the benefits have been broken out as a series of bullet points. This makes them easier for the reader to understand.

There are often opportunities to shorten sentences containing phrases that have passed from spoken to written language, where they were partly created to buy time. For example, people say 'at this moment in time' instead of 'now'. You should question the usefulness of phrases such as 'taking these points into consideration'. What actual value are they adding?

You can further reduce word count, and improve the impression of a sentence, by turning unnecessary negatives into simple positives. For example, 'we are not averse to negotiations on this issue' becomes 'we are happy to negotiate this' or even 'this is negotiable'.

HINT

Do not get too carried away with shortening sentences. If you overdo it you can end up with staccato fragments that are annoying to read. Some grammar checkers pick this up by flagging them as 'fragments'. Slightly longer sentences help the flow of a passage and make it pleasant, and easy, to read.

Tracking changes

If there is a bid manager or administrator to hand then tracking changes is not your problem, and hopefully there will be a system or standard for version control. However, if you are compiling material from other contributors that is not on schedule or in the order that is easiest for you to use, then you need to consider a DIY solution. One way is to keep track of things using a progress chart based on the structure of the proposal (or at least of your part of it). An example taken from such a chart is given in Table 6.1.

Table 6.1 Part of a progress chart

Section	Author draft due/actual	Edited	Reviewed by author	Issued
1 Introduction	23/05/13 24/05/13	25/05/13	26/05/13	–
2 Requirement	30/05/13			
2.1 – Requirement summary	26/05/13			
2.2 – Technical requirement	28/05/13			

One useful method is to print out a large version of this table and keep it on the wall, filling in the boxes with a highlighter pen as the stages are completed. This low-technology approach provides a very visual indication of what is missing and what remains to be done. You can do the same thing with a spreadsheet (see the template shown in the resources section at the end of this book).

Another issue relating to collating information is the need to spot gaps; such a chart will make it clear if there any gaps or late deliveries.

Most word processing programs offer some form of 'red lining' change-tracking support. This is useful in allowing you to see changes clearly and to review them before accepting or rejecting them. It is also often possible to add comments in 'review' boxes to provide additional information, pose a question to the author, and so on. This is particularly useful when editing the work of people who are physically remote, where you don't have the opportunity to sit down and talk with them about the changes.

KEY POINT

Once something has been edited it is essential to get the original author to re-read it and agree that it still means what it did when they wrote it – at least in matters of fact.

File names

If you have a system such as SharePoint or Huddle (see the resources section at the end of this book) that does version control and keeps an audit trail for you, then you need not worry much about file names.

If you don't have access to a system that does it automatically for you, then something like this scheme for filename formats, which I have used with many clients, will help:

NN-name-ABddmmyyvn.doc

Here *NN* is the section number; *name* is the document title, *AB* is the initials of the author, *ddmmyy* is the date of editing and v*n* is an incremental version number. For example:

01-Exec-Summary-AB260212v1.doc

Where you edit someone else's document, you can modify this format by adding -*abddmmyy* to it, to show the date on which you edited it (*ab* is the editor's initials, which you follow by the date). For example, AB's document edited by me would become:

01-Exec-Summary-AB260212v2-dn270212.doc

So long as you can get people to stop calling everything 'doc1.doc' or making changes without changing the filename you will be OK.

KEY POINT

Never throw away any draft until the proposal is complete and submitted. Even then, consider keeping early versions – you may want to go back to them later.

Formatting

If you are editing other people's work or editing the whole proposal then you may need to make sure that all the pages have the right format, i.e. that the layout meets the requirements chosen for your organisation's proposals. You may even end up defining that format (in which case, see Chapter 9). The responsibility for that will typically rest with whoever ends up with the editorial role, and if you are reading this section that may well be you.

This will be a mechanical exercise that can either be left until the end, if a mad panic is desired, or worked on as the bid progresses. Using templates can be a big help here. There are no shortcuts with this work; every page will need to be checked to make sure that it conforms to the layout required.

Proofreading

For any proposal, proofreading is very important. Lack of time should be the only factor that reduces the amount of proofreading done. Sadly, it is very hard for people to proofread their own material. This is largely because the writer knows what is coming next, and so will be unlikely to pick up on missing words and other 'obvious' mistakes. So somebody else needs to do it. Sadly, much of this work will end up with the person who owns the role of editor. Judicious use of spelling checkers, templates and other automated tools will help reduce this burden, at least for the mechanical aspects of the job. However, it is still necessary to check that the correct word is used, to make sure that page breaks and numbering all make sense, and so forth.

In general it is easier to pick up errors in a hard copy than on screen, though obviously it is easier to edit online (making sure you always have a backup copy of the original to go back to). The hard-copy version will make it much easier to spot problems with page breaks, and layout issues that may look just fine on the screen – though this only matters if the document is to be printed at some point. As mentioned before, reading things aloud (somewhere quiet, not only to avoid embarrassment but also so that you can hear yourself speak) is a good check.

HINT

If there is an independent team (for example a Red Team) whose role is to review the bid, ask them to note any proofing points they pick up on their individual copies. The more eyes, the better.

Answering the question

In Chapter 4 on proposal writing skills, much was made of the importance of answering the question put by the client, not one that the writer would like to have been asked. Along with the mechanical aspects of proofreading, the original author should be asked to check that questions have been answered. It may be beyond your technical skill, as the editor, to know whether the answer is correct or even along the right lines. However, if it is not clear to you that there is something provided as a response to each question that might answer it, then it will not be clear to an evaluator.

A common example is the multiple-part question. The client may have made a general request for information and then followed it up by asking a number of sub-questions relating to particular details. It is very easy, in the heat of a bid, for the writer responsible for answering the question to answer the main part and then miss out one of the supplementary points. When editing you should make a point of checking for this as part of the proofreading exercise.

Readability check

There are many readability checkers available, and many word processing systems now have them built in. These will typically use some combination of sentence length, characters per word and the complexity of the sentence structure.

A three-step manual method follows, which hopefully you will not need often. You can use it for an individual paragraph, a page, a section or an entire document. Most of the time it will be most helpful with a troublesome paragraph or section (provided it is at least 100 words long). Analysing an entire document would be very time consuming.

1. Count the number of words in the text under review (W_{total}). Count the number of sentences (S_{total}). Divide W_{total} by S_{total} to get W_{ps}.

2 Count the number of words with three or more syllables per 100 words. Ignore composite words such as 'bookkeeper', hyphenated words such as 'cross-subsidise', capitalised words and those three-syllable words ending in -es or -ed that are verbs (such as 'demoted'). This gives the number N_{ts}.

3 The readability index (RI) is given by adding together the numbers from steps 1 and 2 and multiplying the result by 0.4. $RI = 0.4(W_{ps} + N_{ts})$

This should give you a number somewhere between 6 and 20. If it does not, check the calculation or make sure you have a realistic sample of text. The following list gives a guide to interpreting RI values.

< 10 What you have is easy to read. Most English-speaking adults will have no trouble understanding it, even if English is not their first language.

10 to 12 This is still easy to read for anyone whose first language is English, but some non-native speakers may start to struggle.

12 to 16 This is now getting more difficult; the writer is now making assumptions about the reader's education and grasp of English. It may be worth spending time reviewing this material to simplify it. In most cases it will be a simple matter of shortening sentences.

> 16 At this level the audience needs to consist of well-educated native English speakers. This may be acceptable for specialist passages aimed at a specialist audience, but the management summary certainly should not read this way.

PREPARING MATERIAL FOR PRESENTATIONS

Proposals are often supported by presentations or question and answer sessions.

If you are involved in writing a proposal you will often be involved in either giving follow-up presentations to clients or helping others prepare for them. It is outside the scope of this book to cover presentation training and techniques. There are many excellent books on the subject, including some by my wife, for those seeking help (see the bibliography at the end of this book for a selection). However, this short section is intended to provide some useful pointers to success.

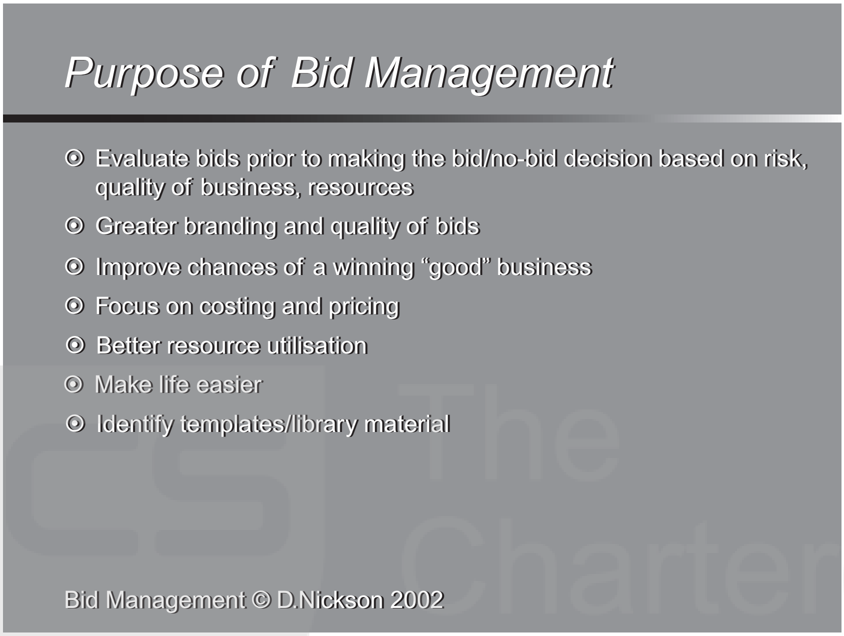
The emphasis here is on extracting and refining the information you need, rather than how you might physically present it. It is assumed that the presentation material will generally be in the form of still slides.

Presentation material

Slides

As with page layout and design, the answer for slides – unless a professional designer is to hand – is to keep it simple. Keep the number of special effects to a minimum, and choose a plain background, with perhaps your organisation's and the client's logo discreetly placed. Use special effects such as dissolves and animation sparingly. They can look very tacky if not done well (this depends on your experience and familiarity with the software presentation package used). A simple, if slightly dull, example is given in Figure 6.1.

Figure 6.1 Sample presentation slide



Key points to consider when reviewing slides include:

- spelling;
- type fonts and text styles;
- grammar;
- use of logos, abbreviations and acronyms;
- layout and design;
- structure and readability.

In addition you should make sure that, where there are to be several presenters, the presentations link together seamlessly.

> **KEY POINT**
>
> Only include information that is directly relevant to the audience. If they don't need it, then leave it out – brevity is best.

Handouts

These are to support the presentation, not to supplant it. As a minimum for any client presentation, the handout set should include a hard copy of the slides. If the slides have used colour then consider providing the handouts in colour, too. The usual considerations with regard to spelling, grammar and so on apply.

Rather than print out every slide at full size, one to a page, look at printing two, three or four to a page. As long as they are still readable this will save you time and reduce the bulk of the handouts. Leave space for note taking, however, even if you don't give out the handouts until the end of the presentation – it can be helpful to the recipient later on. I like to give out handouts after the presentation, as it discourages the audience from reading ahead and getting distracted.

Be careful about including anything else in the handouts. You are unlikely to be giving a presentation that is based on a fixed script, so there is no need for that, but you might want to provide supporting material such as brochures, technical information and so forth. Again, if it is not directly relevant to the presentation content and the audience it is probably not needed.

SOFTWARE TOOLS

The obvious software support you will need is the word processor and the spreadsheet. These are found everywhere my target audience is expected to be, so there is nothing more to add about them. In addition you might need a suitable drawing or illustration package, but again these are likely to be to hand.

However, if you do find yourself editing other people's proposal text then it is likely you will be working in a team environment. It may well be that your organisation has software in place that allows you to share and manage, documents, for example for version control. However, if you are part of a small to medium-sized enterprise, or indeed sometimes within a larger company, this might not be the case.

CASE STUDY

One of my clients had an internal network and the usual office suite software but nothing to support managing proposal documents with multiple contributors and reviewers. These people actually worked in three different timezones (in fact, on three different continents) and the mechanism for moving documents about was basic email; there was no common network for data exchange. Matters were further complicated because many were mobile or remote workers.

Choosing tools

The first consideration is whether your organisation already has tools you can use. If it has, then time pressure means that going with what is in place is the default decision.

Points to think about include:

Time to implement. You are in a hurry, so you don't have time to wait while something is procured, set up and so forth. So that may restrict you to cloud-based solutions.

Cost. This has two issues: can you (or your organisation) afford it, and does getting budget approval take too much time? Again, this nudges you in the direction of cloud- or internet-based solutions, which can be free or at low cost per user.

Security. This is the tricky bit. Although for most purposes most of the systems are OK, if you are really concerned about the security of your proposal material then anything in the cloud or internet arena may have issues. You may choose to encrypt your documents, or simply to password protect them. If in doubt, get advice.

Ease of use and administration. We are back with time again. If it is not really easy to do the basics (sharing documents and version control) then it will be a non-starter. This is more important than having every last bell and whistle.

Backup. You need to be confident that the system will keep the copies of your documents safe; you can't afford to lose them.

Version control. Having something that will allow you to track (and gain access to) changing versions of your documents and manage or control access by multiple writers, reviewers and editors is very useful.

Availability. The system needs to be available as close to 24 × 365 as possible – you can't risk not being able to get at your documents just when you need to deliver them to the client!

Access. All those involved in writing, editing and reviewing a particular document need to be able to get at it. This implies either a cloud solution or an organisation-wide internal network (preferably with some facility for remote access by home and mobile workers).

I've used SharePoint (Microsoft), Huddle, Ubuntu's One Zone, Dropbox and Google Apps, and they have all worked OK (within various limitations). There are very many others, and I have no reason to dismiss them just because I have not used them. I've found Huddle and SharePoint to be good in terms of offering security and features with reasonable ease of use. In reality the choice will be what you can get in place at the time. The resources list at the end of this book includes links for some of the more common options.

SUMMARY

This chapter has given a brief outline of what to do when you have to deliver material that you did not write yourself. It can be surprising to those who have never had to do this that it can take so much time to review and edit other people's work. So, if you find that you do have responsibility for others' words, make sure you allocate enough time to do the job. Remember you will need to go back to them to make sure that by editing the words you do not change the meaning. You will also rapidly discover that some authors can take criticism and changes very personally. I know I do. Be sensitive, and keep any criticism constructive. Do not give in to temptation and tell someone they have produced rubbish; make positive suggestions as to how it can be built on to make a better case.

The following checklist is included to help with the mechanics of editing.

Checklist – editing

- The basics:
    - spelling
    - grammar
    - readability
- The details:
    - abbreviations
    - acronyms
    - logos
    - company names
    - trademarks
    - glossary
    - format
- Proofreading:
    - Have you done enough?
    - Are all questions answered?
- Presentations:
    - spelling
    - grammar
    - readability
    - abbreviations
    - acronyms
    - logos
    - company names
    - trademarks
    - links
    - format

7 SUPPLIER AND CLIENT CULTURE

We do not make a world of our own, but fall into institutions already made, and have to accommodate ourselves to them to be useful at all.
Emerson

AT A GLANCE

- effects of the culture of both supplier and customer on the style, content and presentation of a proposal;
- issues and their resolution;
- examples from the public and private sectors;
- the audience(s) you are writing for.

INTRODUCTION

As with all writing, the guiding principle for proposals is 'know your audience.' Often time is so pressing that it is all you can do to try and answer the question and get the basics across. But it is always worth taking the time to find out something about the organisation you are bidding to, or better still the people who will actually assess your bid. The organisation you operate in, its industry or market and the type of bid will also affect the way information gets presented.

The purpose of this short chapter is to help you become aware of these factors and how you can take them into account and produce a more effective document.

CASE STUDY

A local government organisation had to bid to continue supplying the service it had been set up for when it had been moved into the private sector. The organisation was made up of managers and support workers in a caring service delivery environment. They found themselves in a situation where they were having to behave as a commercial organisation bidding for work instead of delivering a service. They found this very hard, because they did not think in terms of delivering benefits or deliverables to a procurement service and then working according to service level agreements. They had no experience of this type of sales world, and nor did they understand the process that the decision-making body would employ. Their culture was a strong one, but it was very different from that of the procurement organisation – they struggled to understand it, and the first time they bid for work, they lost. They learnt from this and employed external advisors to help the next time – and were successful. Effectively they acquired the bridge between the two cultures from the outside.

Although I strongly endorse 'know your audience', and the idea that you should write for your readers, there is another point to consider. If the culture and norms of your organisation are very different from those of the clients then it may be that, however hard you try, they won't match. Indeed, it may be because they are so different that one needs the other. For example, a child welfare charity may have a very different culture from that of an IT company, but it might well need an IT supplier. The supplier need not, and should not, pretend that its culture is significantly different from what it is, but it can still recognise the value of the culture of the client and make an effort to communicate with that in mind.

A word that is often used in this context is the cultural 'norm'. A simple example of a cultural norm is dress style. I have worked with a wide spectrum of organisations where the 'norm' has varied from creatively dishevelled through jeans and t-shirt, and then smart casual, all the way to bespoke tailoring. As a freelance person you are given some leeway; as an employee you usually conform to some extent. Even as a freelance when I found it necessary to be on a client's site three days a week I had to invest in an additional suit. (An interesting side issue – an exercise in research for the reader – is what effect corporate dress code has on people's ability to perform different functions. A collar and tie may well choke off creativity!) With this in mind, you would normally adapt your dress style to that of your client or employer. The same is true of the language and concepts you would use when producing your proposal.

Cultural norms cover more than dress sense. They also apply to manners, speech and language, approach, degree of formality, bureaucracy, timekeeping, on-site presence, meetings, hierarchy and so forth.

KEY POINT

It is difficult for organisations with very different cultures to communicate easily, and the difficulty doubles when they are trying to sell to or buy from each other. Be sensitive, and take culture into account; avoid 'us and them'.

It is possible, in extreme cases, that a client's and a supplier's cultures are so different that they cannot work together. However, in the case of most commercial and public-sector organisations I consider this is unlikely to be the case. Such extremes are outside the scope of my own experience and of this book.

ORGANISATIONAL CULTURE

Your organisation

Organisational culture can be hard to assess, looking at it from the inside. It isn't within the scope or aim of this book to turn the reader into an organisational expert; though for those who wish to look into this further there are entries in the bibliography. For the purposes of writing a sales proposal all you need is to be aware of is that what works for you may not work for them.

As a useful starting point I have provided an organisational checklist later in this chapter. It sole aim is to get you thinking about how your organisation and your client's organisation function and behave, so that you can take this into account when writing for them. You may also need to take it into account when considering how your organisation may need to adapt when delivering the work once you have won.

When you've decided roughly how your organisation fits within the areas on the checklist, have a look at how this is reflected in internal and external written communication.

KEY POINT

It is worth keeping in mind that the end client may not always be the one that conducts or assesses the proposals for the procurement. For example, many UK local authorities will outsource buying to external experts. Their culture may be quite different from that of the local authority. Something similar may be the case in any procurement, so be careful.

Your customer's organisation

When writing a sales proposal, understanding your customer's organisation is even more important than understanding your own (though without understanding your own context it is hard to know how the one will work effectively with the other). It is also harder to do, unless you have worked with the client for a while or have access to people who have established working relationships with them.

Your customer's organisation will have norms in just the same way as your own organisation does. Ex-employees or freelancers who have worked there can be an important source of information here. However, be cautious about basing an impression on a single source. People tend to go on their recent, personal and local experience even if they have been with an organisation for some time.

Most organisations' websites will give you a flavour of how they operate. Even though they are likely to paint a flattering picture, it shows how they would like themselves to be seen, so it will still be a useful one. You can find out a lot about what they think is the culture to aspire to here. They will usually have supporting information about their 'corporate social responsibility (CSR)' programmes, staff development and environmental policies, too – all of which helps set the scene for your writing.

Look at your own website, too – you can cross-check it against the client's. Just as people who live in a big city often fail to visit the tourist attractions, it is surprising how many people never look at their own organisation's website.

CASE STUDY

I once worked for a large organisation that was the target of what is called a 'leveraged takeover' – in other words, a smaller company borrowed money to buy a bigger one. The cultures were very different, one being essentially an organisation that worked long term on account relationships with large clients, with a substantial public-sector and finance presence. The buyer was very much a commodity selling company built on doing deals: 'You buy an extra thousand and I'll give you 20 per cent off the first 500' – that sort of thing. The buyer took over ownership of many established, very large accounts. I overheard one of the now senior sales managers saying to the previous account manager: 'I'm really looking forward to snouting around at XYZ.' XYZ was represented by a veritable Sir Humphrey Appleby character (see bibliography), a donnish old-worldly man. I understand initial meetings did not go well.

KEY POINT

This kind of cultural mismatch works both ways round. If you come across as patronising then that is just as bad as being too 'barrow boy'.

Cultural difference applies very much to the written word, too. It may be the norm in an organisation to revel in management-speak, such as 'a single throat to choke', but unless you are sure that is the case among your audience it can be very dangerous. If clients consider the culture of the seller too alien they will not want to deal with them.

The organisational checklist in the next section will help here. See also the later section on market sectors as a 'starter for 10'.

ORGANISATION CHECKLIST

This checklist covers areas to think about and their likely impact on what might be looked for in a proposal. The norms that you find in your own organisation are the ones with which you are most likely to be at home and possibly the ones of which you are the least aware, as you take them for granted. They are 'what you don't know you know' (see the link in the resources section at the back of this book for more information about this idea, which comes from the Johari window technique). Identifying them will help you compare and contrast your norms with those of the client.

Organisation chart – how many layers of management. Is the organisation flat or hierarchical? This tells you quite a bit about the way different people will work or behave. National culture has an effect here; some are more rigidly top to bottom than others. Size of organisation is a factor, too – 200 people with 10 layers would seem over the top in terms of hierarchy. 50,000 people with 10 layers might not be. Also consider the number of people in the layers – is the pyramid linear, or do a very few people right at the top have disproportionate power? You might want to compare and contrast well-known organisations.

Company norms (how they dress, how they address each other, and so on). Is it very formal, very casual or something in between? Creative industries tend to be more laid back or easygoing and old-fashioned businesses more strait-laced. This is likely to be reflected in the style of writing they prefer; if in any doubt stick to plain English, which is a safe bet. It is embarrassing to discover that what you thought was a jargon-ridden management consultancy sort of client turns out to dislike such jargon itself.

What they spend on the company image. The key point here is how much they value their image. If they are very image or brand conscious then this will affect the way any part of the organisation interacts with the outside world, and perhaps even internally. I have known organisations that do not allow even the most informal internal email to be sent without it meeting strict guidelines on format, font, logo and legal disclaimers; the corporate communications guide is rigorously enforced. Always respect the image of your client, and make sure what you write and present shows that you can support it. If your own organisation is less concerned with this, then make an extra effort to deliver material that is 'better' than would be acceptable internally.

Corporate social responsibility (CSR) and sponsorship. Many organisations operate CSR programs, where they support the society in which they exist. This can take many forms, for example support for education in the community, scholarships and part-funded apprenticeships, charity schemes and environmental activity (sustainability can be a separate area for many companies over and above any CSR work). Sponsorship may be for sport, the arts, museums or culture in general. The focus of this may give an insight into the preferences of the organisation or of its senior management. For a technical response this may have limited direct relevance, but it might influence the choice of analogy or of case studies that are relevant to similar areas (outside the purely technical).

Time keeping. Is the organisation one where strict hours are observed? Does it run on a long hours culture? Knowing this will make a difference to how you might propose to work with them. If your own organisation has a different approach, then this needs to be taken into consideration.

On site or off site – remote working. Are staff expected to be on site, at their desks at all times, or is getting work done all that matters? For example, at one of my (smaller) clients the managing director changed. Prior to the change the attitude was that you needed to be on site for customer visits, meetings and so forth, but other activity could be home-based or remote as was easiest. The new boss's approach was that 'all pre-sales people must be on site, at their desks unless they need to be at a client'. From the point of view of someone bidding for work with this organisation, the 'on site' fixation would affect the way you would propose to do work for them, and this would affect what you would write.

Deadlines and how they handle them. Do they have a reputation for meeting deadlines or for 'stretching' them?

Pay scales. Is the company above or below average in its pay scales within its sector? This is more important when relating to the client you are selling to, perhaps, but again it can make a difference in their approach to spending money on staff and equipment.

Attitudes to overtime and unpaid overtime. As with pay levels, this is an indicator of how assets (people as well as equipment and property) are viewed and will have an impact on the sort of benefits they will relate to. It will indicate their approach to value for money, whether they want to refresh their technology or to make it work as long as they can. Being aware of such norms helps you frame an argument that goes with, or against, those norms. For example, you might be able to persuade them that spending more money now (on new technology) might provide a lower total cost of ownership or improve overall productivity, even though it seems to go against their usual approach. It can be, of course, much more complex than this, but the more you know about factors like this, the closer to their actual requirements you get.

Staff turnover, length of service and so on. The level of 'turbulence' within an organisation is an indicator of its overall stability and its approach to long-term investment. The higher the turnover, the more likely it is to focus on the short term. Knowing this might change how you would go about delivering services to it (for example, with more or less use of freelance staff). It might also affect your perception of the organisation as a long-term client.

Honesty. This is a difficult one to assess. Some organisations place a higher value on integrity than others. It may not affect how you write or what you propose, but it may well affect the care and attention you put into specifying exactly what you will supply and the related terms and conditions (the 'define' element of the proposal – see Chapter 2).

CULTURE AND LANGUAGE

The cultures of your own and the client's organisation will shape the language routinely used in each. Fortunately my observation is that there tends to be a bigger contrast between organisations' spoken words than their written words; writing, being more formal, tends to be less colourful. People tend to be more colloquial and organisation specific in their speech than they are on paper. I have a client that uses the word 'challenge' a lot, as a shorthand for disagreement that is OK and is not disrespectful. It might seem odd to use that term in a written proposal, but if you were bidding to that client you might consider it when you were comparing and contrasting different options.

This use of vocabulary can get more difficult where either your own organisation or that of the client's staff is a long way from the 'norm' of plain English. For instance, one might use a lot of technical jargon or acronyms in everyday conversation. That does not mean it is OK to use these in a written proposal. For one thing, the result may be ill defined (remember that one purpose of a bid is to 'define' what is on offer); for another, what acts as a familiar shorthand in speech may not be appropriate in writing. In speech people might also use slang, bad language or stock phrases (the old bugbear, 'at this moment in time' instead of 'now', springs to mind, not to mention such things as 'having all our ducks in a row' and so forth). It is usually not a good idea to use these in your proposal, even if you are confident that they would be understood.

The biggest difference I observe in written procurement or proposal documents is the choice of 'person' in the language used. For example, a document might say: 'ABCD requires an upgrade for its customer service database to support 250 users and to provide user access via a secure internet connection.' Alternatively it might be written as: 'we need to upgrade our customer service database, and you are being asked to quote for 250 users and secure internet access'. If I were responding to the former I would stick to the third person (he, she, them, they); for the latter I would use the first (I, we, me, us) and the second person (you, your, yours). Where you wish to be less formal you can avoid the singular/plural pitfall (all organisations are singular) by saying: 'At ABCD, we offer a flexible service …' Then you can use 'we' in the following sentences.

HINT

Use language that the clients use themselves, but avoid controversial management language and jargon-laden terms.

KEY POINT

That this gap in cultural norms in language is bridgeable is proved by the ability of advertising agencies to work across a wide range of industries and clients, though many specialise. The ability of service organisations such as lawyers and accountants to deal with diverse clients also shows it can be done, though perhaps with scope for improvement.

MARKET SECTORS

The following notes are purely my own view on what to expect from the main high-level market areas in which technical people are likely to support sales. In reality these areas are further subdivided by market segment; for example, oil and gas, health, retail, defence and so on. Further differences emerge at the level of individual organisations, country of operation and, when it comes down to it, at finer levels of detail until you reach that of the individual reader – the communication cycle in Chapter 3 shows what happens once you reach the one-to-one level.

I acknowledge that most specialists will operate within a specific industry niche or vertical market. However, smaller companies and also those whose expertise crosses markets will encounter new market sectors. Indeed, with the increasing entry of private-sector provision into public-sector supply it becomes more likely that these two cultures will meet more and more often.

> **KEY POINT**
>
> As I have said, these are just my impressions, and you should always consider each client as a one-off, but these broad generalisations may give you a start if you are new to a market.

The public sector

The public sector is much more complex than it appears to the casual observer; if you are not already involved in it then there is an awful lot to learn about.

This sector is governed by formal procurement processes (in Europe called OJEU – see Chapter 8), so a formal approach to writing is usually advised. It is structured along the lines for government and state service provision. These include health, defence, employment, education, environment, justice, transport, business and so forth. In addition, agencies and all kinds of semi- or quasi-governmental organisations are used for specific functions. It is important to understand them and their interactions when writing for them. The resources list at the end of this book provides links and information on where to find out about the scope, and the names, of some of them.

There is also the local authority market. These are, unsurprisingly, structured geographically, by town or city, county, region and so on. Their responsibilities vary, as does the extent of their authority.

The situation is further complicated by interactions between national and local government and individual sectors. For example, road maintenance in the UK is carried out by the Highways Agency (mainly covering trunk roads and motorways), by local, district or city authorities (and others) directly, and by joint ventures set up by combinations of these and private-sector specialist suppliers. Schools, health, social services and housing are similarly varied.

The public sector has many technical, social and political standards, and it is important to be aware of these and sensitive to them. Many people who are used to the private sector really struggle with what, to them, seem like a lot of irrelevant non-technical hoops to jump through when they just want to focus on the technical solution. This is the nature and the culture of the market.

It is worth noting that public-sector organisations can raise revenue and can make profits, though these profits belong to the 'state' rather than individual shareholders. However, this gets more complex where private-sector organisations are used to deliver public-sector services. This can make life more interesting for those bidding to provide products or services to a private-sector supplier whose own customer is in the public sector; the public-sector requirements and regulations can cascade downwards.

One thing the whole area has in common is that bidders will find themselves having to operate in an environment open to public scrutiny and regulation. It is also subject to politically or socially driven considerations that may not apply in the private sector. I have seen experienced private-sector specialists flounder when given their first exposure to public-sector procurement. They take time to come to grips with the overall picture, which includes, for example, specific requirements relating to sustainability.

It is not difficult to adapt to this area, but it does take time to get fully acclimatised. In general you will find that the formality in regulation and procurement is reflected in the style of proposal writing that works best. This is a market where you should keep management-speak and jargon firmly under control in your response (in part because they have enough of their own to cope with; this is the natural home of the acronym alphabet soup).

KEY POINT

In the UK the names, functions and scope of major government departments seem to be in continual flux, which leads to frequent changes in their names. The DFS may become the DFES and then the DFEE (it matters not what these initials stand for; the point is that you need to keep a close check on what they are when you write your proposal).

Not-for-profit or non-profit organisations

Not-for-profit or non-profit organisations (NPOs) include charities, some religious groups, trade unions, trade associations, museum trusts and the like, together with other organisations where any profits made must be put back into the organisation to help it achieve its aims. There are legal differences between charities, trade unions and community interest companies, and different regulations concerning how they operate, but they are essentially similar for the proposal writer.

In addition to the wide range of activities in which NPOs have always been involved, they are increasingly supplementing or replacing services – The Citizens' Advice Bureau being a good example of this. They vary in size from very small, locally funded and focussed operations to international operations such as Oxfam (which, at the time of writing, had a UK turnover of about £300m) operating in over 90 countries worldwide. Some, such as the International Red Cross, engage with many tens of millions of volunteers; they are thus likely to procure a wide range of technology and other specialist services.

Related to these, though the terminology is confusing, country specific and inconsistently used, are non-governmental organisations (NGOs). Indeed, Oxfam is frequently classed as an NGO. Others include Greenpeace and the World Wide Fund for Nature (WWF).

As with the public sector, these are likely to be organisations that are transparent and open to audit in all they do. So they will tend to have a formal approach to procurement and the writing that goes with it. Where they are international, the culture will be more varied, and it may be harder to pigeonhole them when deciding how to write. In general, treat NGOs and NPOs as being broadly similar to the public sector.

The definition of the not-for-profit sector is country specific, as are the regulations and laws that apply to it.

The private sector

This area covers such a wide range, from one-person artisan or creative businesses up to multinational conglomerates, that it is impossible to characterise it. My advice, and this should really apply to any prospective client, is that you need to take them as they come. That said, you will find that individual sectors or vertical markets have their own cultures; retail is not like oil and gas, manufacturing is not like advertising, and so forth.

Where your technical expertise brings you into contact with vertical markets you haven't come across before, the best thing is to research the client and the sector. The client's website, as mentioned before, is a good starting point, as are the industry- or market-specific press and websites. The best bet is to talk to someone who already knows (see Chapter 5 on getting information from experts).

Each vertical market has its own culture, it is tempting to stereotype estate agents, bankers, advertising, manufacturing and so forth. The fact that there are such stereotypes is the evidence that there are differences, and that it is worth investigating further before setting finger to keyboard. Try and find out.

It has been noted within the public sector that there are private-sector organisations that find themselves having to fit in with the public-sector approach to procurement. In addition, there are private-sector organisations that are formally regulated, for example utility companies, organisations such as the BBC and publicly owned for-profit companies (such as the Post Office) that are regulated in much the same way as traditional public-sector organisations such as a government department. Again, this is a situation where private-sector specialists can find they are suddenly working in an unfamiliar environment – the information in Chapter 8 can provide some background to help this make a little more sense.

There are often related regulatory bodies for such markets. For example, there are Ofwat (the Water Services Regulation Authority), Ofcom (the independent regulator and competition authority for the UK communications industries), Ofgem (Office of Gas and Electricity Markets) and so on – some of these names are acronyms, and some are not. When dealing with one of the organisations they regulate, it is always a good idea to see what the regulators do; this is often a major driver for how the regulated organisation runs its business.

CHECKLIST: COMPARING SUPPLIER AND CLIENT CULTURES

Language. Is English their first language? Are they fluent English speakers who use a different variant of the language, e.g. American or Indian? Will the document need to be translated into another language for delivery? Make sure you use language the readers will be comfortable with and find easy to understand. Do they write formally or informally? (Hint: examine the language of the requirement documents they issued you with – if in doubt use a similar language style.) **Make sure you get their name right, and ask permission before using their logo.**

Culture. Are you aware of their culture (see the checklist earlier in this chapter) and how it fits, or doesn't, with that of your own organisation? Have you identified where the cultures support or, where they are different, complement each other? Have you thought of ways of minimising the impact of differing cultural norms? This may be as trivial as choosing to be very precise or formal in the language you use in the proposal (this is the equivalent of wearing a suit when you visit a client where that is the norm).

Values. Do you know what their values (often expressed as 'core values') are? It is good practice to support these values in your bid where you can. For instance, one of my clients includes 'Honesty' and 'Trust' amongst its values. You could support these by offering shared access to, for example, statistics relating to service delivery. Of course, many of these, though expressed in such high-level words, are supported with further detail. This detail can be used to identify specific areas you can help with. These values can also be expressed via straplines and can manifest themselves in broader terms via CSR activities.

Goals. Have you identified their business, social and organisational goals? This is over and above identifying goals for the specific project or service they are buying (you should research that, too – but they are more likely to have told you it, anyway, as part of the procurement briefing documents). Are there any undocumented goals that you are aware of? For example, they may have had bad press from a recent project or service failure and want to be doubly sure it does not happen again, or they may want good publicity as a spin-off from the new project. What do you think they define as 'success'. How will what you do help them achieve that success?

TRANSLATION

Where what you write is to be translated into another language, make sure the work is being done by someone translating into their own language. Ideally they should still live in the country (and so the culture) where the proposal is to be submitted. This helps avoid issues such as the famous soft drink advert in which the product, instead of reviving you, brought back the dead.

8 OJEU PROPOSALS

To understand Europe, you have to be a genius – or French.
Madeleine Albright

AT A GLANCE

- writing proposals within the OJEC/OJEU procurement system;
- guidelines, rules etc;
- a typical OJEU procurement;
- introduction to the OJEU process;
- the alphabet soup of documents and requirements and their purpose.

INTRODUCTION

To some extent this chapter follows on from the previous one, in that it deals with a specific audience and culture: that of procurements in the UK public sector that are run in accordance with European procurement rules.

KEY POINT

The first acronym to learn is that OJEU stands for the *Official Journal of the European Union*, where all public-sector procurements above specific levels of value or complexity have to be announced. It used to be known as OJEC – the C stood for 'Community' – but the name was changed. Anything that is caught within its grasp has to be run according to EU rules. This also covers some private-sector, but regulated, areas such as utilities.

As you might expect from anything that comes out of the European bureaucracy, this is arcane, complex and constantly evolving. It is beyond the scope of this book to give more than an introduction or overview of this environment. To explain it all would be a lifetime's work, and although I've been working on OJEC (now OJEU) proposals for many years I still find it can spring surprises. However, for my audience, specialists who find themselves writing material to contribute to such a procurement, this chapter will give an introduction to some of the key points.

This is by no means a comprehensive and definitive guide, and, indeed, the ‘target’ is a moving one and so subject to continual change. You may not be convinced that any of it makes real sense (in terms of common sense at least), but it should become a little more understandable. In particular, I hope that it will reduce the shock that some experience when they encounter EU procurement for the first time. A glossary of some of the alphabet soup associated with it is included here, too; a more extensive glossary can be found near the beginning of this book.

CAVEAT

I am not a lawyer or an in-depth subject matter expert for EU procurements, and what is presented here is only intended to give a flavour of the processes in place when the book was written. It should not be interpreted as formal advice or guidance, but only as background information. It is not written in the precise legal terms needed to guarantee its accuracy. You should take appropriate legal advice before bidding under EU rules. In addition, it keeps changing!

My recent involvement with small to medium-sized enterprises (organisations with fewer than 250 staff) who have been encouraged to bid for UK public-sector work has underlined the shock to the system that it can bring.

CASE STUDY

I was involved in reviewing, providing quality assurance and suggesting how to make themes and strategy more likely to be winning ones for a proposal to supply taxi services to a regulated organisation within the greater London area. This came within the remit of OJEU rules. As a consequence the client, for the first time, had to go through two stages: to complete an initial pre-qualification questionnaire (PQQ) and then respond to an invitation to tender (ITT). This seemed to me and to the bid writer – both very experienced OJEU veterans – a reasonably painless operation; we took for granted all the detailed questions asked, even at the initial PQQ stage. For the taxi company, very expert at running their own organisation, it came as a shock. For example, they were asked to provide case studies or examples where they had dealt with particular circumstances, such as VIPs, security requirements, vehicle breakdown and so forth, together with client references to support them. And, of course, there were all the usual questions about equal opportunities, sustainability, financial stability and so on. Oddly enough, they did not have this type of material ready to hand and found the work involved challenging. Getting outside help was a smart move – they did win the bid – and they found that what they had learnt meant they could then do much more themselves; they decided to look at other opportunities within the OJEU arena. The first OJEU bid will always be the hardest, and anyone in such a situation should be prepared.

The Official Journal of the European Union (OJEU)

The OJEU lists public-sector contract tenders and notices from all EU countries. It has been published in over 20 languages each working day since the Treaty of Nice was entered into in 2003. The OJEU superseded the earlier Official Journal of the European Community (OJEC) with the establishment of the European Union. The hard-copy version ceased publication in 1997, so it is really an electronic publication and is accessible online through Tenders Direct (see the list of resources at the end of this book).

NOTE

At the time of writing, EU Directives specified that all European contract tenders above £101,000 (central government) and £156,000 (local government) had to be published in the OJEU.

The OJEU rules for central and local government apply in full to:

- computer and related services;
- accounting services;
- architectural and consultancy services.

They are applied less fully, or differently, to:

- health services;
- educational services;
- recreational, cultural and sporting services.

Utilities such as water, power and so forth are also regulated. Other organisations in the broader public domain may also choose, or be required, to use some or all of the process.

Note that there are specific processes used for Defence procurements – these are not covered here. If your organisation is involved in this sector it is reasonable to assume that it is aware of them, and you should look for help internally. For example, the *MOD Defence Contracts Bulletin* (MOD DCB) lists defence contract opportunities within the UK and some in Europe.

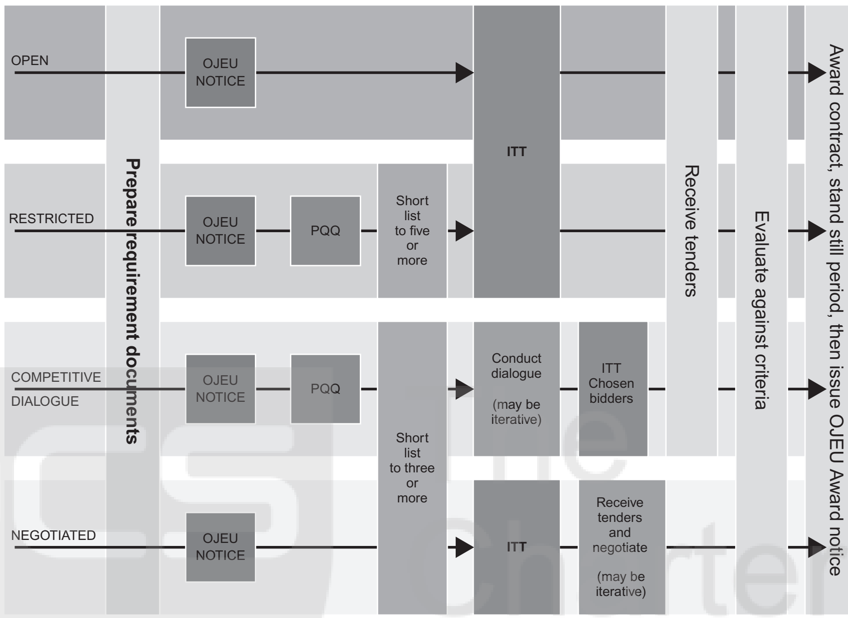
NOTE

See the resources list at the end of this book to access information about updates to the rules and the way the application of them differs.

THE OJEU PROCUREMENT PROCESS

Figure 8.1 shows how the various EU procurement processes fit together. It is simplified and leaves out different methods of issuing various notices and the timetables that then apply. There are legally defined rules for these, and it is not appropriate to consider them here.

Figure 8.1 Principal OJEU procurement processes



KEY POINT

The OJEU rules specify time ranges for each of the steps in the process (and there are subsets for each procurement process, which have been left out of the figure for simplicity). Overall OJEU procurements range from a few weeks up to in excess of a year (for complex competitive dialogue bids).

A typical OJEU procurement

Figure 8.1 shows the four main OJEU procurement processes that are used. This example is based on the 'restricted' process, as being a suitable compromise choice to provide the technical proposal writer with an idea of what is involved.

The gist of it is that those interested in bidding are filtered out using a pre-qualification questionnaire (PQQ) to produce a shortlist of the most suited bidders. The PQQ usually does not involve pricing, though it may request very indicative numbers from time to time.

The bidders then get a more detailed document, an invitation to tender (ITT). The result of this is an award of contract, which is made final after a short 'cooling off' period (currently 10 days or more) to cover any appeals, errors, second thoughts and so forth (there are rules concerning what can be reconsidered). Figure 8.1 shows this restricted process; access to more detailed information is available via the resources listed at the end of this book.

OJEU notice

The OJEU notice lists information that must be submitted by the supplier and how to receive the necessary documentation to express an interest in taking part. These notices are published in the *Official Journal of the European Union* (see the resources section at the end of the book for a link to its website).

Pre-qualification (the PQQ)

The PQQ is used to cut down the numbers of those potentially tendering (remember that the tender is open to the whole of the EU area) to a practical level. The process must be run consistently and fairly, and is open to challenge. My experience with IT tenders for the public sector is that, by and large, there might be as few as half a dozen or as many as 20 or 30 bidders – but this is just a guide.

This assessment will cover basic things such as:

- financial status and stability (whether the bidder is able to fund the work, not about to go out of business, and so on);
- legal status;
- technical capability;
- past performance and references for similar types of work;
- quality assurance and standards;
- corporate social responsibility;
- equal opportunities in employment;
- social diversity;
- environmental issues, health and safety and so on, as appropriate.

KEY POINT

Most PQQs follow this structure, but there are variations, and the questions are not always posed in the same way – always read them carefully and answer the questions as asked (ATQ).

The various components of the PQQ will be evaluated either as an absolute pass or fail (usually the financial, legal and commercial areas) or on a weighted basis. Usually track record and experience is weighted the most heavily, along with confidence that the technical capability exists. It is common for the basic evaluation model to be included with the PQQ, and it should always be taken seriously when answering.

The evaluation is often a two-stage process (saving time). The first stage consists of eliminating those who do not meet the pass/fail questions. Those that get through are then evaluated against the remaining qualitative, usually weighted, questions. Five suppliers are usually required for the next stage of the restricted process.

KEY POINT

You can request feedback on your PQQ response – win or lose – and it is a good idea to do this for the sake of 'lessons learnt'.

NOTE

Suppliers may be excluded where certain circumstances apply, such as bankruptcy or professional misconduct. It is also currently compulsory to exclude those convicted of involvement in organised crime, corruption, fraud or money laundering. Suppliers can also be eliminated due to lack of economic and financial capacity (based on, for example, annual turnover) and technical capability (based on experience with similar contracts in the past five years).

Invitation to tender

At this stage the prospective suppliers are issued with the ITT, a much more detailed document than the PQQ. Its normal structure is typically:

Instructions to tenderers. Administrative procedures, evaluation criteria and key dates, for example those for submission.

Specification of requirements. Details of the actual requirements.

Form of tender. With pricing schedule and so on.

Terms and conditions. The contractual terms under which the required goods, services or works will be provided.

The ITT will often identify references, site visits and requests for post-submission presentations. Where it does, you should start planning for these as soon as you receive it. Writing up references is very much like writing up case studies – see Chapter 4 for suggestions.

KEY POINT

Where there are presentations there is an opportunity to refine the story you told in the proposal, and it is a chance to meet with the client – human interaction!

Tender evaluation

As with the PQQ evaluation, this has to be done consistently and fairly and is open to challenge, to establish lack of bias and so on. Again, as with the PQQ, evaluation takes place against predefined criteria and weightings. The evaluation model, or a summary of it, is usually supplied at least in outline. The most common approach to selection is known as MEAT, which stands for 'most economically advantageous tender'. This does not mean the cheapest, and there are other approaches. It is a combination of price and quality. The process may be a multi-stage one if there are further pass/fail scoring levels required. Always take account of the evaluation criteria; in particular, where you are short of time, focussing on the highest-scoring questions is good exam technique.

Tenders may be evaluated on the basis of:

Price. The lowest priced tender wins – there are rules to prevent overpricing and to stop suppliers 'buying' the business.

MEAT. Factors other than, or in addition to, price, such as quality, technical ability or TCO, may be included. Where this is done the criteria must be given and the weighting specified, for example as an exact number or a range – typically expressed as a percentage of the total score.

Award of contract

After the evaluation has been completed, together with whatever internal sign-off processes are required, the winning and losing bidders will be informed. Under EU rules (since January 2006 until at least the time of writing), there is then a 10-day gap to allow for any appeals, challenges and so forth before the official announcement of the winner.

An award notice is then published in the OJEU – currently within 48 days of the contract award.

OTHER OJEU PROCUREMENT PROCESSES

See Figure 8.1 for the overall process flows.

Open. Typically used for buying commodities rather than services, this is not suitable for complicated procurements. Anyone in the EU can bid and can request the relevant documents to which to respond. It is an all-in-one approach, where all the information, including the price of the tender, is submitted in one go. There is no requirement that everybody's tender be evaluated, though there have to be selection criteria to support eliminating tenders. Once they are submitted, that is it – no further negotiation is permitted.

Restricted. See the worked example given as 'a typical OJEU procurement' earlier in this chapter. This is a frequently used process, with pre-selection via a PQQ and then a formal tender process for invited bidders. The submission is definitive, with no further negotiation before the contract award.

Competitive dialogue. This is a more recent process. It was created so that bidders could interact with the client and discuss the specification and terms of the deal interactively. Cynics suggest that it is a way of obtaining free consultancy, but the key goal is to produce a realistic specification for complex procurements. This interaction is done during a dialogue phase (hence the name), where suppliers work with each bidder to define the best solution. There are rules to stop the client doing a 'mix and match' of the various options (hence the term 'competitive'), but suppliers may be asked to agree to some level of cross-fertilisation. After the dialogue those remaining are asked to submit a final, definitive tender (sometimes called a BAFO). As with restricted and open processes, that is it – no further negotiation is allowed. This process is a costly option for both the supplier and the client – if you are involved in one you will notice the workload.

Negotiated. Bidders can negotiate the terms of the advertised contract with the procurer. There are restrictions on when this process can be used, and it is not commonly found in IT projects.

Frameworks. Framework agreements are used to preselect a number of suppliers, perhaps for a particular service or product; they are effectively catalogues. The selection can then be used without the need to repeat the overhead of a procurement every time the services or products are needed. There are some current restrictions on such agreements: they can't run for over four years, and once in place they can't be significantly modified from the original agreement. They must also specify who can use the framework (for example, the Cabinet Office). Work is then allocated to the suppliers either by means of mini competitions – typically just on price – or by specifying which suppliers do which type of work, by taking turns, or by some other system, which needs to be defined in the agreement.

SOME OJEU TERMS AND ACRONYMS

These have been gleaned from several sources and edited down to cover the minimum. See also the general glossary near the front of this book, and the further information available via the resources section at the back.

BAFO	best and final offer;
CPV	common procurement vocabulary codes – part of a package of measures specially developed by the EU to simplify and modernise EU procurement (EU buyers must use CPV codes under EU directives);
EEC	European Economic Community;
EOI	expression of interest;
EU	European Union;
EU thresholds	financial limits based on estimated value of a contract over its entire lifetime (where the value of a contract is expected to exceed the relevant threshold, it must be advertised in the OJEU);
Framework agreement	an arrangement between buyer and suppliers over the terms of future dealings between them, without a commitment to or guarantee of any volume of business;
ISDS	invitation to submit detailed solutions, which forms part of a competitive dialogue procurement (defines a solution after it has been refined during the dialogue, and is usually preceded earlier in the dialogue by an ISOS – these are both significant documents in terms of work involved);
ISOP	invitation to submit outline proposals;
ISOS	invitation to submit outline solution (issued during the competitive dialogue process, requiring the bidders to define their proposed solution);

ITSFB	invitation to submit final bids;
ITSFT	invitation to submit final tender (an invitation to remaining bidders in the competitive dialogue procedure to submit their final bids at the end of the dialogue);
ITPD	invitation to participate in dialogue (a document inviting bidders in the negotiated procedure to participate in a negotiation process and setting out the terms applying to that process);
KPI	key performance indicator (an important set of measures by which the client will assess a bid, and possibly the ongoing service delivery);
MEAT	most economically advantageous tender;
MSP	managed service provider;
OJEU	*Official Journal of the European Union* (formerly OJEC), an online publication publishing contract opportunities with values over specified EU thresholds;
PIN	periodic indicative notice or prior information notice;
PQQ	pre-qualification questionnaire (first step in the ‘restricted’ tender procedure used by public-sector bodies to shortlist eligible suppliers);
PSA	preferred supplier agreement;
PSL	preferred supplier list;
RFI	request for information (a client request for general information from suppliers – similar to a PQQ);
RFP	request for proposal;
RFT	request for tender;
SLA	service level agreement;
Standstill period	a period of at least 10 days after contract award notification before the award is made final – allows time for appeal by unsuccessful bidders (also known as that Alcatel period);
TUPE	transfer of undertakings (protection of employment) – a significant cost driver in outsourcing proposals;
Variant bid	a bid which is different from that specifically asked for in the tender documents – examples include different pricing structures, or innovative ways of working;
Works	typically used in construction bids (for example, resurfacing a road).

9 PRESENTATION AND FORMAT

Form follows function.
Louis Henri Sullivan (refined further by Frank Lloyd Wright)

AT A GLANCE

- layout design and presentation basics;
- page layout;
- document structure;
- fonts and styles;
- breakout boxes, figures, headings, numbering and contents;
- use of style guides and templates.

INTRODUCTION

This chapter covers the things that make the difference between having good content and having good content that also gives a good impression, and so biases readers in its favour before they have even read it. It makes a positive contribution to one of our themes.

KEY POINT

Make life easy for assessors. They are more likely to score you higher and give you the benefit of the doubt.

The layout and structure of a document go a long way towards making it easy to understand. If you have not been given a template to work from, you can help things along by taking into account some simple factors.

CASE STUDY

Just to show how presentation and format can really matter, I offer the following example. My clients took me on board to work on the 'next' stage of their proposal in a competitive dialogue bid (see the sections on EU procurement terminology in Chapter 8). They had put together their ISOS (again, see Chapter 8), an initial proposal and some costing, and were very confident that they had done a wonderful job and that there was no chance they would not be on the list.

As part of my induction I was given the proposal to read. My feedback was requested. I was honest, and said: 'It is confusing in layout, and the content is impenetrable; what's more, the executive summary is not only 60 pages long, it covers material that is not in the rest of the proposal. It also looks a total mess and is hard to follow.'

The bid director said that I didn't know what I was talking about, as this was a competitive dialogue bid and didn't work like a normal proposal. Well, it was only my opinion, but sadly I was correct – something from which I gained little pleasure, since my contract was terminated, there being no more bid to work on.

A critical factor was that the actual content had been lost in a format and structure that meant it was difficult to identify what was actually said. Whatever the document, and whatever the context, there is no value in making it hard to read and understand or unattractive to look at.

That bid director never spoke to me again.

LAYOUT, DESIGN AND PRESENTATION

'If it looks right, it will fly right', is something often said about aircraft design. Getting things to look right goes back long before aircraft came on the scene, though. The ancient Greeks put their faith in the golden ratio – where the ratio of the width to the length of a rectangle is the same as the ratio of the length to the length plus the width. This golden number works out at about 1.61, and the 'A' series of paper sizes (for example, A4) uses this ratio. One of the reasons people admire Classical and Georgian architecture is because it makes use of this ratio in the proportions and placement of doors, windows and so forth. Having a format and layout that is attractive as well as easy to use will make a positive difference.

Suggested guidelines

The following guidelines will help those, like myself, who are without formal design expertise or training. They are appropriate for most public- and private-sector clients in the UK.

These guidelines will help give you a clean and attractive proposal document. If you consider that the client needs something more complicated, then you will need external help.

- Use the standard size of paper (in Europe that is A4).
- Double-sided printing is more eco-friendly but may be hard to photocopy, so if the client requests a hard copy submission ask whether they would like a single-sided, unbound version.

- Keep the design clean. It should not look complicated or messy – keep the amount of 'clutter' to a minimum and keep a reasonable balance between white space and text or pictures. You should be able to 'see the wood for the trees'.
- Don't use more than two typefaces on one page. I suggest using one font for the client and different one for your own organisation. I usually use a serif face (such as Times Roman) for the client and a sans-serif one (such as Arial) for the answers.
- Don't use more than three font sizes on a page – keep it to headings plus main text. Use a typeface that is easy to read and print (Times Roman and Arial are commonplace).
- Obey any layout rules specified by the client (even if they contradict any of the above!).

Proposal structure

The following is a typical proposal structure and is a good starting point where the client has not provided you with a structure to follow. Feel free to adapt it to meet your needs and, more importantly, those of your audience.

1. Introduction
2. Management summary
3. Understanding of requirements
4. Proposed solution
5. Response to requirements (for example, mandatory and desirable requirements)
6. Financial proposal (prices and payment options)
7. Annexes (brochures, annual reports, technical specifications, quality certificates and so forth)

You may find you need to use a mixture of layouts, changing for example between portrait and landscape or even using larger paper formats as fold-outs to give some of the information. This applies to both paper and electronic submissions.

Page layout

To make the document easy to use, professional looking and easy to identify and refer to, every page should include the following information.

- date;
- page number;
- copyright;
- organisation name;
- client name;
- bid and section titles.

In addition, it is usual to have some sort of confidentiality statement (for example, 'Commercial in Confidence'), typically included in the footer of each page. You can use graphics such as company and client logos and so on, subject to copyright restrictions (always ask first).

KEY POINT

The best way to include this administrative information is to put it in the header or footer sections of the document. This keeps the design 'clean' and separates it from the writing.

NOTE

There are rules that must be obeyed governing documents with security information in them; your organisation should have someone who knows these rules if you don't. Make sure they are complied with. They will determine who may have access to the documents. Classifications include 'restricted', 'confidential', 'secret' and 'top secret', with increasing levels of sensitivity.

Fonts and typographical styles

As said earlier, I recommend only having a couple of different fonts in a proposal.

Which fonts should be chosen?

If there is a house style with defined fonts, then use them. There may even be an in-house style guide that explains what is used where (it will probably be owned by the marketing department). If there is not, then choose commonly used fonts such as Arial and Times Roman. This may not make a strong design statement, but it will at least mean that the document has a familiar feel to it and will be readable on most IT platforms that the client is likely to have.

The next need is to make it easy for the reader to discriminate between different heading levels, notes, comments and diagram titles. I suggest doing this by using a combination of type sizes and of attributes such as bold or italic.

The example style set out in Table 9.1 has been found to work well on A4-sized paper. All the main body text is in the same font, only two typefaces have been used, and a combination of font size with bold and italic shows the differences in function. Note that Times Roman has only been used for client text.

Table 9.1 Fonts and type styles for writing proposals – an example

Style	Example
Normal text	Arial 11-point
Title (change to suit cover page)	**Arial 20-point bold**
Top-level heading	**Arial 16-point bold**
Second-level heading	***Arial 14-point bold italic***
Third-level heading	**Arial 12-point bold**
Client questions	*Times Roman 11-point italic*
Figure titles (I suggest making them 'centred')	***Arial 11-point italic bold***

Another question relates to type alignment, the technical term for the way the edges of the type line up. The two sample proposal page designs in Appendix A demonstrate the difference. The second of them has been set using what is known as ragged right. That means the left-hand edge is straight and the right-hand edge varies in relation to the right-hand margin according to the length of the words. For most proposals it is recommended that this style be adopted for all paragraphs.

If a very formal look is required, as in the first of the two samples in Appendix A, then it may be reasonable to consider what is known as 'justified text', where both left- and right-hand edges form straight lines. However, this can lead to some odd word spacing or to overuse of hyphenation (where words are artificially split over a line break to make the type fit the available space). This can be harder to read, particularly if you have readers whose first language is not English.

Breakout boxes, charts, diagrams and illustrations

Pictures are not just 'worth a thousand words', they add to the visual appeal of the document and break up potentially dull slabs of text. That said, only use pictures or figures that are directly relevant to the text they go with. Avoid the temptation just to drop in a pretty image to break things up. There should be a good reason for including a diagram, chart or illustration.

The layout should take illustrations into account in terms of positioning, size and so on. Try and have figures that use the same fonts and 'look and feel' as the rest of the document. They should have a similar style to give the overall document a consistent feel.

Breakout boxes

These are useful add-ons to the main text of a proposal (see the examples in the second sample page design in Appendix A). They allow you to separate key points from the main body of text so that they stand out and catch the eye. You can also use them for client quotations and similar elements to which you want the reader to pay particular attention.

Figure headings

Every chart needs to have a heading associated with it that identifies it uniquely within the bid. The heading should clearly state what it is about – preferably not repeating the words on the figure itself. Ideally it should also be numbered.

KEY POINT

Refer to figures by their numbers rather than by their positions on the page – they may no longer appear 'above' or 'below' when the document is printed, and that can annoy some people. At a pinch it is OK to use 'following' or 'previous', so long as you check that they really are.

Figure numbering

There are many ways of going about numbering figures. I prefer to number them according to the section or paragraph they appear in; for example, 'Figure 9.1 Sample chart layout' would be the first figure in Section 9. Where more than one figure appears associated with the same paragraph, subsequent figures are given a suffix letter, 'a', 'b', 'c' and so on. Use of the word 'Figure' is optional – '9.1 Sample chart layout' is just as clear.

Others choose to number all the figures in a document sequentially, using '1', '2', '3' and so on throughout the entire document. The problem with this occurs if you add a figure early in the proposal; you end up having to renumber the whole thing, not just the relevant section.

Layout

Whatever layout you choose, adopt it for the whole bid; be consistent so as to deliver a common 'look and feel'. All charts, figures and illustrations must look as though they belong to the same document and come from the same professional organisation. They need to be surrounded by enough white space to separate them from the text and to make it clear where the diagram begins and ends. I recommend that they are centred on the page and printed large enough so that any text on them is clearly legible.

Design

Keep it simple. Unless you have access to a professional illustrator or designer, resist the temptation to produce anything more than a simple illustration. Clip art (sample artwork provided with some software applications) can be useful to supply stock elements, but make sure you pick ones that have a consistent style. Do use clip art with care, as it was not created with your specific audience in mind; nor was it designed to go with a particular house style. For pictures of standard items such as office equipment, computers, buildings and the like this is not usually an issue. Beware of using humorous images, however, unless you are 100 per cent sure that the client will find them funny, too. There is a risk that they may think: 'If it is a joke to them now, how will they treat me after they have won the business?'

In addition to clip art there are numerous drawing packages available. These require the skills of an illustrator if anything adventurous is planned, but they can help.

> **NOTE**
>
> Beware of using large fold-out spreads for complex project plans or similar material. They can look very good, but they will add significantly to production problems at bid delivery time. Use them only if there is a real benefit to the bid document, and try to have them at the start of a section so that editorial changes do not cause havoc later on. Of course, if your submission is entirely electronic this may not be a problem.

Tables of contents and indexes

In any document longer than about 10 pages a contents list is a useful navigational aid. Once a document gets past 50 pages, it is almost essential. The level of detail that needs to be in a contents list varies, usually depending on the audience. My advice is to keep it to top-level and perhaps second-level headings only.

Where bid documents cover multiple volumes, there needs to be a contents section for each volume. After this it is also worth including contents lists for the other volumes, to make any cross references that people need to make as easy as possible. In addition, this lets readers see where information is covered that is not directly relevant to them at the moment.

In some cases, where a section is very long (over 20 pages), it may also be worth having a contents list at the front of it. However, you might want to ask 'Why is this section so long?' It could make more sense to break it down into smaller segments instead.

The case for indexes is less clear than that for tables of contents. Proposals are not really like textbooks; they are more like works of fiction! The readers need to know where they are in the story, but are unlikely to want to look for all entries referring to, say, 'software installation'. If there is an overwhelming case for having an index (the only one I can think of is that the client insists on it) then plan ahead. Establish the minimum number of entries that must be included and allow a large amount of time at the end of the bid for generating it. You will need to be expert in using your word processing application to generate indexes and to understand the principles of indexing too. The online help in most word processing packages will give guidance, and there are books on the subject, not to mention professional bodies such as, in the UK, the Society of Indexers.

Glossary

Creating a list of abbreviations and acronyms, company and trade names can be helpful, if only to make things consistent. Some enlightened procurement organisations provide, and ask for, a glossary in order to make reading complex technical bids easier for those evaluating them. Do include one if time permits.

USING A STYLE GUIDE

Making design decisions can be difficult, because everyone has their own aesthetic taste; they all think they have a view worthy of consideration. My philosophy is: 'If it looks right, it probably is right.'

However, if the design decisions are to be of any use they need to be frozen and communicated to everyone who needs them. This means having a style guide. If you are among this book's target audience, I'm assuming you are someone drafted in mainly to write a proposal; having a style guide may help you, but you might find policing it with others harder. But by having one, you at least know what you aim to end up with, and you can apply it retrospectively if you are responsible for delivering the proposal to the client.

Here is a suggested structure and content for the style guide for a proposal.

Text styles. The agreed specification for the use of fonts to display the written word in a bid, as described earlier in this chapter (for example: Arial 11-point for plain text). Standards for numbering should also be included.

Use of logos. Rules to be applied when using the organisation's and clients' logos: where they can be placed, size, permissions required and the like.

Page layouts. Standards for page layouts, templates for use, page size and related matters.

Presentation layouts. Standards and templates for slides to be used in client presentations, including the use of logos and similar considerations, as before.

Technical standards. Any technical constraints that need to be considered when producing anything for inclusion in a bid (for example, word processing formats, acceptable formats for pictures, bit-map images, spreadsheets and so forth).

Presentation and binding. Binders to be used, covers, cover sheets, bookmarks, tables of contents and similar details.

Language and grammar. Guidelines on common errors, use of organisation and brand names, capitalisation, spelling checkers, writing style (for example use of first or third person) and so forth.

Templates

It is worth considering setting up a bid document skeleton. This document has samples in all the styles and fonts to be used; numbering systems and so forth are defined, and it has all the top-level headings already in place. Many government procurements will specify such a structure anyway, so you may not even have to think it up in the first place. The more that can be done at the start to get the basics in place, the less time will be wasted at the end when the pressure will be on.

Be cautious when using templates. In most word processing systems it is possible to set up a template document that defines text, heading styles and the like, which can then be issued to the contributors to the bid. Sadly these templates are not set in cement, and the contributors can easily (hopefully only accidentally) overwrite the formatting that has been provided to them.

In Appendix A there are two sample pages – examples of simple and effective designs that are consistent with the suggested guidelines and have been positively received by my clients.

MAKING IT LOOK GOOD

Unless it is an electronic submission, the binder is the first thing the client sees when receiving a bid document. If it looks cheap, amateurish or just plain messy then you will already have reduced your chances of winning. Here are some suggestions on choosing the packaging for a bid.

Two-hole binder. These are readily available, and every office will have a two-hole punch; two-hole pre-punched paper is also quite common. They tend not to work so well with large numbers of pages, and it is quite easy for pages to get torn. On the other hand, it is easy for the client to take out pages and make copies. They are available in many colours and can be obtained with clear plastic pouches to take the artwork for covers, spines and back sheets. Where a large number of volumes and copies are involved these lend themselves well to mass production by collating parties at the end of the bid.

Four-hole binder. These are not quite as commonplace as the two-hole kind, and people do tend to keep their four-hole punches under lock and key. That said, there should be no real problem in using them, and the benefits of not having the pages flapping around so much and the impression of greater quality make them my choice. They are available in many colours and can be obtained with clear plastic pouches to take the artwork for covers, spines and back sheets. As with two-hole binders, they are suitable for mass-production techniques.

Three-hole binder. Don't use these! They are not in common use, and even if your organisation has the equipment to punch the holes and so on the clients probably won't, and so will get annoyed if they want to put material such as notes or copies of their own questions into your binder.

Plastic comb binding. These come in various sizes and colours and are capable of taking anything from just a few pages to over a hundred. They can give a good result but tend to be time consuming to use and are not client friendly in terms of disassembly for copying and so forth. They are particularly time consuming to use for large print runs or multiple-volume bids. Make sure the margin is wide enough to allow for the binding – be extra careful if using double-sided printing.

Spiral wire binding. This is similar to plastic comb binding, but the result looks less attractive and is even harder to unravel. Again, make sure the margin is wide enough to allow for the binding – be extra careful if using double-sided printing.

Glue binding. This involves the use of a thermal binder in conjunction with special sleeves into which the pages are placed. It is only suitable for relatively small documents, as larger ones are prone to coming apart. It is also time consuming to use for anything other than a fairly small bid, as there is little scope for mass-production techniques. A major disadvantage is that the client will find them difficult to photocopy for internal distribution. The finished product can look good, but is not usually appropriate for bids. Don't forget to check on the margins.

Finishing touches

Finishing touches are in the 'nice to have' category. If time permits they do add to the overall package – they are the sort of thing you can get organised for one bid and use as the basis for the next. Once set up they won't have the time penalty that might preclude their use. If your organisation has a dedicated print room, bid production facility or similar facility (often within the marketing department), then it might be possible to get them to produce things like this.

Bound documents. Include a clear plastic sheet (they can be obtained ready punched) in front of and behind the bid document when using a binder. In the case of binders with covers it stops the pages sticking to them. In the case of spiral or glue bindings it helps to give a smart appearance and to keep them coffee proof in use.

Spines. When using binders that have a clear plastic envelope on the spine, create some artwork to go into this with the client logo, your organisation logo, the title of the volume or the bid and so on. This adds to the overall impression of quality produced by the end product.

Dividers. As well as being essential for making the bid documents easy to use, dividers can be decorated with artwork to add to the smart impression. It is even possible to have them printed up with key points from the sections that follow them – hammering home key sales themes. This does take time, and if it has to be left until the last minute the extra hassle is not worth the effort.

Bookmarks. A plain bookmark will make the job of anyone evaluating your bid easier to do. There is also an opportunity to include sales messages the company logo and attractive artwork on the bookmark, which demonstrates attention to detail and puts across the idea that you care about the client. One possibility is to include a basic contents list on it, but you must keep this high level unless there is time to make last-minute changes to it. As an example, were this book to be a bid then, as well as having the publisher's logo on it, it might have 'Better bid management saves you time' printed on a bookmark.

Custom labels for computer disks and media. If an electronic copy of the bid is being included on a USB stick, CD or DVD, then it is worth having suitable printed labelling or artwork to identify it (admittedly tricky on a USB stick). Handwritten labels look messy, and failing to label the material at all is asking for trouble.

APPENDIX A – TEMPLATE PAGES

Two sample pages are offered here as examples of simple and effective designs that are consistent with the suggested guidelines and have been positively received by my clients. The first of them is the more formal one and may be better suited to the public sector. The second is less formal and should suit most commercial organisations. It also has the benefit of a large margin for notes and space for break-out boxes. In both cases the text is aligned as ragged right and I have adopted a conservative approach to different fonts and styles.

1 MANAGEMENT SUMMARY

1.1 Introduction

This document sets out David Nickson's proposal to BCS for a bid writing book. It covers the points requested by the editor and shows why publishing it will benefit both BCS and David.

1.2 Key Points

Review of proposals and other bid documents has shown them to be variable and inconsistent. Furthermore, they do not do justice to the competent and professional staff within the organisations that produce them.

Proposals fall short of the standard to be expected from an organisation of the calibre of ABCD. They are often repetitive and contain simple errors; they do not always answer the question asked and they lack consistency. The client's perception can be of rather intimidating, difficult-to-use and unattractive documents that lack customer focus – and in particular strong sales propositions.

Note. David Nickson has the skills to produce excellent proposals and explains how others can do the same. Everyone asked stated that there were insufficient proposal writing books on the market.

1.3 Way Forward

Buying David Nickson's book on bid writing will have major benefits for most organisations. These include:

- producing consistent bids more easily;
- winning major new business;
- reducing last-minute panics to a minimum;
- making the world a better place;
- raising audiences to their feet.

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APPENDIX B – CHECKLISTS

This appendix contains copies of some of the checklists from the earlier chapters, arranged on individual pages for ease of use.

Please note that they are copyright and whilst it is reasonable for you to copy them for your own use it is not legal to copy them for wider distribution or commercial purposes.

WRITING CHECKLIST – A SAMPLE STYLE GUIDE

Ten points to remember

- Remember the core themes for your bid – for example, 'credible', 'sustainable', 'value for money'.
- Express material so that it is relevant to the client. **Answer the question!**
- Write easy answers early – if you can, do it now.
- Keep sentences short when you can. Journalists motto: 'Make it short, make it snappy, make it up?' (Well, not the last bit.)
- Keep to any page and word count limits at all times.
- If a word isn't needed, cut it out.
- Use positive language – 'the <organisation name> will …'; avoid 'feels' etc.
- Don't use marketing speak.
- Break up text with diagrams, tables and pictures – don't write if you don't have to!
- Read it aloud when you have finished. If it doesn't read right, it isn't written right.

> For themes, choose something that links your organisation, the client and the bid.

Finally, remember

Fact – feature

Benefit – 'so what?' test

Use benefit/how achieved tables where appropriate.

- Singular versus plural
- It's means 'it is'; its means 'belonging to it'.
- SLAs not SLA's

Answer the question the customer asked, not the one you wanted them to.

EDITING CHECKLIST

- The basics:
    - spelling
    - grammar
    - readability
- The details:
    - abbreviations
    - acronyms
    - logos
    - company names
    - trademarks
    - glossary
    - format
- Proofreading:
    - Have you done enough?
    - Are all questions answered?
- Presentations:
    - spelling
    - grammar
    - readability
    - abbreviations
    - acronyms
    - logos
    - company names
    - trademarks
    - links
    - format

CHECKLIST: COMPARING SUPPLIER AND CLIENT CULTURES

Language. Is English their first language? Are they fluent English speakers who use a different variant of the language, e.g. American or Indian? Will the document need to be translated into another language for delivery? Make sure you use language the readers will be comfortable with and find easy to understand. Do they write formally or informally? (**Hint:** examine the language of the requirement documents they issued you with – if in doubt use a similar language style.) **Make sure you get their name right, and ask permission before using their logo**.

Culture. Are you aware of their culture (see the checklist earlier in this chapter) and how it fits, or doesn't, with that of your own organisation? Have you identified where the cultures support or, where they are different, complement each other? Have you thought of ways of minimising the impact of differing cultural norms? This may be as trivial as choosing to be very precise or formal in the language you use in the proposal (this is the equivalent of wearing a suit when you visit a client where that is the norm).

Values. Do you know what their values (often expressed as 'core values') are? It is good practice to support these values in your bid where you can. For instance, one of my clients includes 'Honesty' and 'Trust' amongst its values. You could support these by offering shared access to, for example, statistics relating to service delivery. Of course, many of these, though expressed in such high-level words, are supported with further detail. This detail can be used to identify specific areas you can help with. These values can also be expressed via straplines and can manifest themselves in broader terms via CSR activities.

Goals. Have you identified their business, social and organisational goals? This is over and above identifying goals for the specific project or service they are buying (you should research that, too – but they are more likely to have told you it, anyway, as part of the procurement briefing documents). Are there any undocumented goals that you are aware of? For example, they may have had bad press from a recent project or service failure and want to be doubly sure it does not happen again, or they may want good publicity as a spin-off from the new project. What do you think they define as 'success'. How will what you do help them achieve that success?

FURTHER READING

The next best thing to knowing something is knowing where to find it.
Samuel Johnson

This section provides suggested reading and sources of help together with various internet links. It is an admittedly partial selection, but a good starting point.

Listing here does not imply recommendation or approval, and, as with anything that refers to sources of information on the web, it is also possible, indeed likely, that some of them may have moved, ceased to exist or been considerably revised since the time of writing. However, they are given as starting points and you can base further searches on them. We can take no responsibility for the present content or accuracy of the material, but note that they were helpful at some point.

BOOKS AND OTHER PRINTED SOURCES

This list includes books that were available at the time of writing but that may become out of print or unavailable over time. In that case they may still be available second hand or at a library (and in fact all will be available in libraries of reference, such as the Library of Congress or the British Library).

You will notice that there seem to be quite a number of my own publications listed here. However partial that might be, they are on relevant topics, and you will also see that I have included books by my direct competitors, so there is some balance!

Language and grammar

Cutts, M. (1995) *The plain English guide*. Oxford University Press, Oxford.

Fowler, H.W. (revised Burchfield, R.) (2004) *Modern English usage* (3rd edition). Oxford University Press, Oxford.

Gowers, Sir E. (revised Greenbaum, S. and Whitcut, J.) (2004) *The complete plain words* (3rd edition). Penguin, London.

Heffer, S. (2011) *Strictly English: The correct way to write … and why it matters.* Windmill Books, London.

Oxford University Press (2005) *New Oxford dictionary for writers and editors*. OUP, Oxford.

Truss, L. (2009) *Eats, shoots and leaves*. Fourth Estate, London.

Time management

Adair, J. (2002) *Effective time management: How to save time and spend it wisely*. Pan Books, London.

Brans, P. (2011) *Master the moment*. BCS, Swindon.

Management, teams and skills

Churchouse, C. and Churchouse, J. (1999) *Managing projects*. Gower, Farnham.

Cory, T. (2003) *Brainstorming: Techniques for new ideas*. iUniverse.com.

Meredith Belbin, R. (2010) *Management teams: Why they succeed or fail*. Butterworth–Heinemann, Oxford.

Nickson, D. and Siddons, S. (1996) *Business communications made simple*. Butterworth Heinemann, Oxford (also available as 'Business Communications 101.' www.lulu.com).

Nickson, D. and Siddons, S. (1998) *Managing projects*. Butterworth Heinemann, Oxford.

Rich, J. R. (2003) *Brainstorm: Tap into your creativity to generate awesome ideas and tremendous results*. Career Press, NJ.

Siddons, S. (1999) *Presentation skills*. Chartered Institute of Personnel & Development.

Bids, proposals and sales

Blackstaff, M. (2006) *Finance for IT decision makers: A practical handbook for buyers, sellers and managers* (2nd edition). BCS, Swindon.

Kennedy, G. (2008) *Everything is negotiable*. Random House Business, London.

Lewis, H. (2009) *Bids, tenders and proposals: Winning business through best practice*. Kogan Page, London.

Nickson, D. (2003) *The bid manager's handbook*. Gower Publishing Ltd, Farnham.

IT procurement

de Coul, J. (2005) *IT services procurement based on ISPL: A pocket guide*. Van Haren Publishing, The Netherlands.

Nickson, D. (2008) *IT procurement handbook for SMEs*. BCS, Swindon.

Stationery Office Books (2005) *Introduction to ITIL*. Stationery Office Books.

INTERNET RESOURCES

Note: as stated earlier, these were available at the time of writing but may well have changed by now. However, this list can at least be useful as a starting point for a web search.

Procurement, OJEU and related topics

Note: some of these include advertising material for services and products.
www.tendermatch.co.uk
www.qsl-ojeu.co.uk
http://www.invitation2tender.com/Glossary_of_Tender_Terms.htm
www.ojeu.eu
www.ted.europa.eu

Information on public procurement law

http://eur-lex.europa.eu/en/index.htm
http://www.out-law.com/page-5964

Document sharing tools

http://sharepoint.microsoft.com
www.emc.com/products/detail/software2/eroom.htm
www.dropbox.com
www.huddle.com
www.ubuntu.com (One Zone)
http://www.google.com/apps/intl/en-GB/business/index.html

Quality assurance and standards

http://en.wikipedia.org/wiki/Quality_assurance
http://www.ogc.gov.uk/documentation_and_templates_project_quality_plan.asp
http://www.itil.co.uk/
http://www.bsi-global.com/
http://www.standardsuk.com/

Miscellaneous

Cabinet Office
http://www.cabinetoffice.gov.uk/
(includes what was formerly the Office of Government Commerce)

Department of Trade and Industry guide
http://www.dti.gov.uk/consumers/buying-selling/ucp/index.html

Magazine
http://www.supplymanagement.co.uk/

Organisations

Associations of Professional Proposal Managers
http://ukapmp.co.uk/

Association of Project Managers
http://www.apm.org.uk/

BCS, The Chartered Institute for IT
www.bcs.org

British Standards Group
www.bsigroup.com

Chartered Institute of Personnel and Development
http://www.cipd.co.uk/default.cipd

Chartered Institute of Purchasing and Supply
http://www.cips.org/

Project Management Institute
http://www.pmi.org/info/default.asp

Society of Indexers
http://www.indexers.org.uk/

Society of Editors and Proofreaders
www.sfep.org.uk

Suppliers
I recommend that you do your own search based on 'bids' or 'proposals' and then select a supplier who suits your technology and market.
www.bidsolutions.co.uk
www.davidnickson.com
www.shipleywins.co.uk
www.thebidteam.com
www.winthatbid.com

INDEX

BIDS, PROPOSALS AND TENDERS

Succeeding with effective writing

David Nickson

Knowing how to write a winning proposal is a key business skill. This book is a must-have guide for anyone producing bids and proposals ranging from short covering letters through to tenders for major corporate or government procurement. Sales, marketing, project and technical staff will all benefit hugely from reading it and keeping a copy on their shelves for reference. It is also very helpful for business students at all levels.

Contents include: the art of proposal writing; the proposal life cycle; presentation and format; editing and reviewing; getting information from experts; corporate and client culture; writing proposals within the OJEC/OJEU procurement system.

- **An excellent guide on how to approach proposal writing**
- **Contains hints, tips and checklists**
- **Includes numerous case studies**
- **Packed with real-life experience and examples**
- **Learn from specialist advice**

ABOUT THE AUTHOR

David Nickson has managed, written and reviewed bids to both the private and public sectors including General Motors, the MoD and the Cabinet Office. He also has extensive experience as a project manager and has over 200 magazine and journal articles to his name along with several books. He is currently director of Astar Computers Ltd.

Well structured, easy to understand and follow, and full of practical advice written in the style David advocates, this book should be a mandatory read for anyone contributing to a proposal, regardless of their role, experience or background. An essential read!

Chris Whyatt
Creator of the Get to Great™ benchmarking methodology

Business

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