

## Proposal to a client

### Introduction:

Established in 2008, Contracts Advance Advisory (CAA) is a highly experienced Bid Programme Management and Advisory Organisation. All our consultants whether directly salaried to CAA or Associates are experts in their chosen industry. We specialise in working with clients who primarily operate in the Public-Sector sphere and therefore our understanding of these sectors, including Health and Facilities Management is exemplary.

CAA can offer tailored Bid Management solutions for our clients, ranging from the provision of a bid writer for simple short-term assignments to the management of the full end-to-end bid process including pre-bid engagement through to the presentation stage, and even mobilisation, as well as the creation of the bid solution; production of the bid response itself and supporting bid process/ structure.

We believe the approach we take to bid management can both improve a client's efficiency in bidding and the client's 'win rate', and whilst we would not suggest there is a right or wrong way to bid management, we believe a tailored CAA approach to a client's needs generates many benefits

CAA like to propose we approach the relationship with a client on the premise that we will provide the comprehensive end-to-end service offering, though understanding that not all elements maybe required for every project. Taking this approach will allow CAA to offer a tailored service to a client dependent upon the requirements of each project.

### The CAA Approach:

The steps we propose are as follows:

#### **1) An initial 'familiarisation' meeting:**

The purpose of this meeting is for CAA to 'get to know' a client. To understand the culture of the business, its ethos and the way the client operates. It's also a great time for the client to get to know the CAA team that they will be working closely with before a project commences.

CAA will hold this initial meeting at no cost to the client.

#### **2) Pre-bid engagement:**

Prior to any bid being published CAA will work with a client to understand the market sector and whether strategically a client should (for example) partner with another organisation or bid stand alone. Similarly, we can also review whether any 'strategic' or supply chain partners are required to strengthen the bid approach and increase the likelihood of winning.

Wherever possible, and for larger projects we recommend clients adopt a pre-bid engagement approach with CAA.



### 3) Bid 'kick off & strategy' session:

When a bid is published CAA will meet face-to-face with the client (bid) team to discuss and agree the key elements of the bid. Primarily, this will include the following:

- a. The Bid Strategy
- b. Solution Design
- c. Key Win Themes and Unique Selling Points
- d. Competitor Analysis
- e. The key Bid Project timelines and Project Approach (tailored to the client's way of working)

### 4) Financial modelling and the completion of the Financial Submission (e.g. the Financial Management templates)

Where required and relevant CAA can co-ordinate the financial modelling process and act as a 'critical friend' through debating and where appropriate challenging the financial rationale pertaining to the bid. In fact, even if a client wishes to manage the financial element of any bid without the support of CAA we would still ask to be involved in the process, as understanding any financial decisions reached can greatly help the structure and content of the bid responses.

Wherever possible we would also always suggest the financial element of the bid is undertaken as a priority at the start of the bidding process.

### 5) The mid-bid review

As part of the bid Project CAA will hold a mid-bid review meeting to determine the following:

- a. To ensure the bid project is on track and no slippage has occurred
- b. To ensure all key actions are being managed
- c. To manage and agree the solution to any issues that may have arisen
- d. To agree that the project should proceed – a continue/not continue sign off stage

Point d. above also closely links to the financial modelling process, as in some instances clients may determine the 'financial envelope' being offered not adequate to deliver the service requirements, and therefore decide not to proceed with the bid.

### 6) The completion of the Bid Responses

CAA will work closely with a client's team to ensure the bid responses are of the highest quality before the bid is submitted. To achieve this (and dependent on the client's requirements) we will adopt the following process:

- a. Hold the 'Bid kick off and Strategy' session
- b. For the more complex and detailed questions the CAA bid writer and project lead will hold f2f workshop sessions with the clients internal Subject Matter Experts (SMEs) to ensure the key elements of the questions are answered to the highest quality
- c. Dependent upon time available and complexity of the bid we will aim to produce two drafts of the responses before the final version is agreed and signed off
- d. To hold a sign off session with the client regarding the final version to be submitted
- e. CAA strongly believe taking this approach will generate a high-quality bid submission for our clients



## 7) The CAA Bid Review

We can action these for either a forthcoming bid with a pressing submission deadline or a retrospective bid(s) where a client may have been surprised by the result.

The methodology for a CAA Bid Review is as follows:

- a. Ideally 7 days prior to the tender submission deadline, a CA consultant will take the ITT tender and your final draft submission and mark against the evaluation criteria – scoring excellent; good; indifferent or weak.
- b. For those that are indifferent or weak we provide suggested solutions and enriched answers.
- c. Either pre or post submission (depending on the submission deadline) we undertake a face-to-face or phone session with your internal stakeholders to run through the enriched answers and the rationale as to why we have suggested the responses given.
- d. The above knowledge sharing exercise allows for a sustainable approach to implementing lessons learned into future bids.

The Bid Review takes one to two days.

## 8) Improving Bid Structure and Process

CAA have worked with a number of clients to support process improvement be that the qualification process through to black and red hat reviews. We have also introduced a best in class methodology that underpins all our processes. Whether a client wants one aspect of this process to supplement existing systems or a full system review we can tailor to suit your needs.

## 9) FOI Project

To supplement the CA pipeline service, we have created a solution to create a 'ready-made' database that will support pre-bid engagement across the sales team in the public sector.

### The Commercial Options:

CAA can offer several commercial options regarding the cost of the Bid Management solution dependent upon a client's requirements and the size of the project. For bids, we are aware that our competition usually offer pricing based on the number of words (the word count) for the allocation of responses with the ITT, though we feel this does not consider all the influences and the above steps that produce a high-quality result. We therefore propose the following approach:

1. A blended day rate, usually based on the number of likely days the project will take to deliver. This rate is usually scalable depending on the number of days agreed
2. A block price approach

In our experience each of the above options are likely to generate a very similar outcome for our clients, and which option is chosen usually depends on each client's preference regarding how they wish to engage with CAA.

For Clients that CAA have an established relationship with we may also work on a 'risk share' model where the initial fee/ rate maybe lower, and a 'win bonus' is paid when the bid is successful.



CAA also prides itself on being as flexible with our clients as possible, an example being should a client choose not to proceed with a bid at the mid-bid review stage then CAA will only charge for the number of days used to that point, or if on a block price, then a pro rata of the agreed amount.

Additionally, where the blended day rate is the chosen option on every project the CAA Project Lead will provide a summary on a weekly basis of the numbers of days used that week and on which specific tasks. This giving the client reassurance and transparency always.

Summary:

CAA are extremely keen to work with clients to deliver an effective bid management and advisory solution tailored to the requirements in a cost competitive manner.

We look forward to hearing from you.

Craig Millhouse  
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