

Contracts Advance Bid Clinic

The Good, the Bad, and the Ugly!



Lee Hasell & Matt Mitchell

15th October 2020

Agenda

Slide



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The CAA 7-Stage Bid Management Process: Good, bad, ugly!

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- Stage 2 - Bid 'Kick Off & Strategy' Session
- Stage 3 - The Financial Modelling/Product Pricing
- Stage 4 - Bid Response Production
- Stage 5 - The Mid-Bid Review
- Stage 6 - Final review of bid before submission
- Stage 7 - Bid Sign Off & Continuous Process Improvement



Summary & final questions

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Introduction & Housekeeping



A discussion webinar



Audience participation



Our insights and experience



Lee Hasell & Matt Mitchell



Lee is our Managing Partner here at Contracts Advance. He manages our Advisory team, and as an experienced senior executive, he's gathered a wealth of knowledge and expertise over the years. Having been both CEO and Director of Business Development for a large blue-chip provider, Lee continues to play an active role within the public sector by providing advice to clients on strategy and bidding.



Matt has over 20 years of bidding experience with considerable operational expertise in corporate and clinical services. Matt has supported CAA and our clients to project manage a multitude of bids in industries ranging from; defence, healthcare, print, and many more. Matt has strong interpersonal skills and is a hugely motivational senior manager who works well under pressure and when managing multiple workstreams.

The CA 7-stage Bid Management Process

1) Pre-bid Activity

- Future bid pipeline creation
- Pre-bid customer engagement
- Qualification & Requalification

2) Bid 'Kick Off & Strategy' Session

- Getting stakeholders together with complete buy-in
- Agree roles and responsibilities
- Project timelines and approach
- Key win themes and USPs
- Produce executive summary
- Requalify

3) The Financial Modelling/Product Pricing

- Run in parallel to the production of the bid
- Turn an Achilles Heel into a service strength
- Ask clarification questions and adapt
- Requalify

4) Bid Response Production

- Workshop sessions
- 2-3 draft versions
- The 5 key elements of the Bid response
- Combining skill-sets
- Requalify

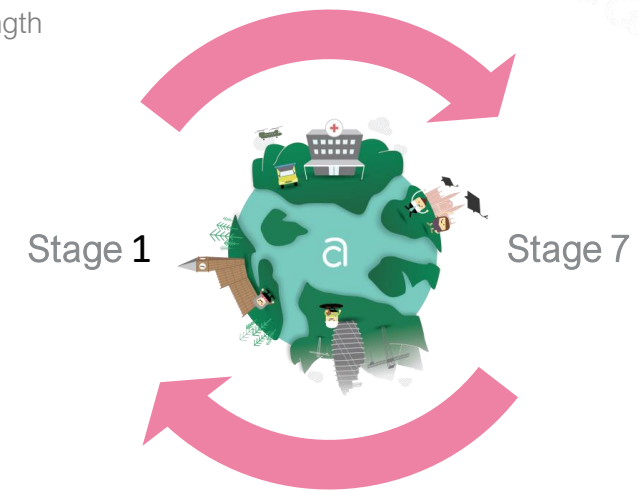
5) The Mid-Bid Review

- Ensure the bid project is on track
- Ensure all key actions are being managed
- Agree solutions to any issues
- Agree if the project should proceed
- Requalify

6) Final review of bid before submission

- Review each draft and the executive summary
- Recommendations to be implemented
- Use the scoring system
- Finalise before final sign off

7) Bid Sign Off & Continuous Process Improvement




Stage 1 - Pre-bid Activity



GOOD: 12 months of pre-bid work (solution created and commercial partners found during pre-bid)



BAD: 12 months of pre-bid work and then decided to abandon recommendations and go with gut feeling!



UGLY: Bidding from alert, and at notification didn't know anything about the contract, incumbent relationship with buyer, or the buyer (one incumbent provider didn't even know the bid was out!)

Stage 2 - Bid 'Kick Off & Strategy' Session



GOOD: Everyone involved (SME's, Board, Leads), a winning attitude and mindset



BAD: SME too busy, Directors aren't involved, minimal attendance and/or no motivation



UGLY: No Kick-off session meaning bid strategy, win themes, and USPs are not defined

Stage 3 - The Financial Modelling/Product Pricing



GOOD: Discuss commercials and finance at, or directly after, the bid kick-off with the wider bid team



BAD: Misinterpreting the finances and/or what's required



UGLY: Finance calculate costing all on their own with no information share to the wider bid team

Stage 4 - Bid Response Production



GOOD: Following the CA 5 Point Plan!




BAD: Not giving enough time to produce 1, 2, 3 drafts and 'complete the circle' on responses



UGLY: Choosing how you want to answer the question, instead of answering the question directly

Stage 5 - The Mid-Bid Review



GOOD: Hold the Mid-Bid review with the same project team as the initial kick-off session, before CQ deadline



BAD: Conducting the Mid-Bid review, but with minimal attendance



UGLY: Not conducting the Mid-Bid review at all, or conducting the Mid-Bid review but not following any of the recommended outcomes of the session

Stage 6 - Final review of bid before submission



GOOD: Picking up all issues/iterations needed on the second draft and not the final review



BAD: The Director(s) not involved from the start and then wanting to make significant change



UGLY: An individual wanting to “leave their stamp” on the bid resulting in changes which weaken the responses – a consequence of having too many reviewers

Stage 7 - Bid Sign Off & Continuous Process Improvement



GOOD: Holding lessons learned to understand all elements of the bid process and what to improve



BAD: Not having a lessons learned session and continuing to reinforce bad practice



UGLY: Not using the lessons learned session for lessons learned i.e. finger pointing



Summary & Final Questions

<https://contractsadvance.co.uk/resources/webinars/>

