

Bid & Proposal Management Training Workshop

Calgary
Edmonton
Ottawa
Toronto
Vancouver

Overview

Proposal Management Workshops are ideally suited to individuals looking to improve their skills in responding to Bids and RFPs with professionally written and compelling proposals.

Sales Professionals, Admin & Sales Support Teams, Consultants, Entrepreneurs, and Small Business Owners will benefit from these content-rich and interactive workshops.

Attendees develop basic to intermediate skills in: interpreting complex bid documents; writing professional proposals that meet mandatory requirements; and creating compelling solutions for buyers.

Condensed Course Outline

This condensed presentation provides an overview of the course agenda and key interactive discussions.

Welcome

Instructor

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Workshop

9:00 am to 3:00 pm

Breaks

Refreshments - 10:30 to 10:45 am

Lunch - 12:00 to 12:30 pm

Refreshments - 1:45 to 2:00 pm

Workshop Agenda

1. Finding Opportunities
2. Reading and Understanding Bid Documents
3. Completing the Bid/ No-Bid Assessment
4. Project Managing Resources
5. Creating a Bid Strategy
 - Why Price is Rarely #1
 - Differentiation Strategies
6. Writing, Editing, Proofing, and Confirming Bid-Compliance
7. Creating a Compelling Executive Summary
8. Secrets to Presenting a Successful Proposal
9. Managing Proposal Debriefings

1. Finding Bid Opportunities

A. Overview - Public

- Funded by taxpayers
- RFPs open to the public
- Strict ratings of mandatory requirements
- Rated requirements with scoring system
- How to obtain RFPs
 - Visit bid-portals and procurement websites

11 slides in this section

A. Overview - Private

- Funded by shareholders
- RFPs closed to the public
- Flexible ratings of mandatory requirements
- Scoring system often not disclosed
- How to obtain RFPs
 - By invitation only
 - Pre-register with buyers

2. Reading and Understanding Bid Documents

A. Industry Terminology

- Types of Opportunities:
 - RFI – Request for Information
 - RFP – Request for Proposal
 - RFQ – Request for Quotation
- Classification Terms:
 - SO – Standing Offer
 - VOR – Vendor of Record
 - RSO – Request for Standing Offer
 - MSOF – Master Standing Offer
 - RMSOF – Regional Master Standing Offer

13 slides in this section

3. Completing The Bid / No-Bid Assessment

The Bid / No-Bid decision is one of the most important decisions the bidder must make.

Many bidders waste time, energy, and money chasing opportunities that are a bad fit.

Not all opportunities are worth pursuing.

Many do not match the bidder's capabilities or strategic goals.

Others are better suited to joint venture proposals.

Still others can be considered pre-wired or slanted towards a favoured supplier.

7 slides in this section

4. Project Managing Resources

A. Roles and Responsibilities

- Executive Sponsor
- Business Development Manager
- Proposal Manager
- Editor / Writers / Graphic Designers
- Subject Matter Experts (SME)
- Peer / Exec Review Team
- Assembly Team

For small firms all these roles might all be covered by one person, the small business owner

3 slides in this section

Why Price is Rarely #1

Professional buyers follow logical decision protocols:

1. Select the best solution that meets all of the stated requirements and expected life-cycle of the project
2. Select a trustworthy supplier who has financial stability and a demonstrated track record for delivering solutions on time and on budget
3. Select the lowest price. If the decision comes down to price only, it indicates bidders are rated equal on protocols one and two

Differentiation – Reduces Price Based Awards

** See tab 11 in workbook*

Differentiation Strategies

Discussion Points

A differentiation advantage occurs when a firm delivers greater value than its competitors

Known as positional advantages because they denote the firm's position in its industry as a superior leader in products, services, or cost

Differentiation impacts performance by reducing directness of competition

** See tab 12 in workbook*

5. Creating a Bid Strategy

A. Proposed Solution

- The solution forms the foundation for selecting a bid strategy
- The solution requires thorough understanding of:
 - RFP requirements: mandatory and rated
 - Stated objectives and desired outcomes
 - Budget restrictions
 - Competition: solutions; pricing; win rate with RFPs of this type
 - Product/Resource availability
 - Aggressiveness to win this RFP

11 slides in this section

6. Writing & Editing

A. Content Plan

- The framework the proposal is based on
- Outlines information to be included in the proposal and sequence
- Themes and win strategies run throughout the content plan supporting the proposed solution and bid strategy
- Typically written by the Proposal Manager in collaboration with the Business Development Manager and Subject Matter Experts

12 slides in this section

7. Creating a Compelling Executive Summary

The Executive Summary provides an abstract overview of the entire proposed solution.

It provides the reader all the pertinent information required to form an opinion without having to read the entire proposal.

Ideally, the Executive Summary should be written before the proposal.

It introduces bid strategies and win themes. Effectively it sets the framework of the proposed solution which is later detailed within the proposal.

4 slides in this section

8. Secrets to Presenting a Successful Proposal

B. Producing the Proposal - The Silent Sales Person

The finished proposal takes on a life of its own once it is submitted, it becomes the bidder's *"Silent Sales Person"*.

It represents the bidder in presentations, meetings, and direct comparisons against competition.

It must be knowledgeable of the buyer's needs, articulate in presenting the bidder's solutions, easy to understand without using too much jargon, and most important it must easily reveal its information to those who want to learn more.

8 slides in this section

9. Managing Proposal Debriefings

A. Debriefing Feedback

- The process of a creating proposal is a learning experience
- Whether a proposal wins or loses there are lessons to be learned
- Ask for a debriefing meeting as soon as the award notice goes out to bidders
- The award has already been announced so do not take your frustrations out on the person giving you the debriefing information. This will only serve to shorten the conversation with valuable information being withheld.

3 slides in this section

Workshop Summary

Thank you for attending our workshop!

Please complete the evaluation forms inside the front of the workbook

Bid-Winners provides 60 days Free Email Support to workshop attendees

(quote workbook key on page 2 in all communications)

Please allow 48 hour for response to inquiries

training@bid-winners.ca

3 slides in this section