

# Bid Alchemy Best Practice Guide



THE BID ALCHEMIST  
MARTIN

How and when you should review your proposal.

Ensuring that your customer is not the first to review your proposal

By Martin Eckstein

Proposal reviews take time and so many bids reduce the time and quality of these reviews to save time.

If you are not careful, it will be your customer who discovers the mistakes.

Bid Alchemy provide you with guidance on the reviews you should ensure are implemented for proposal development

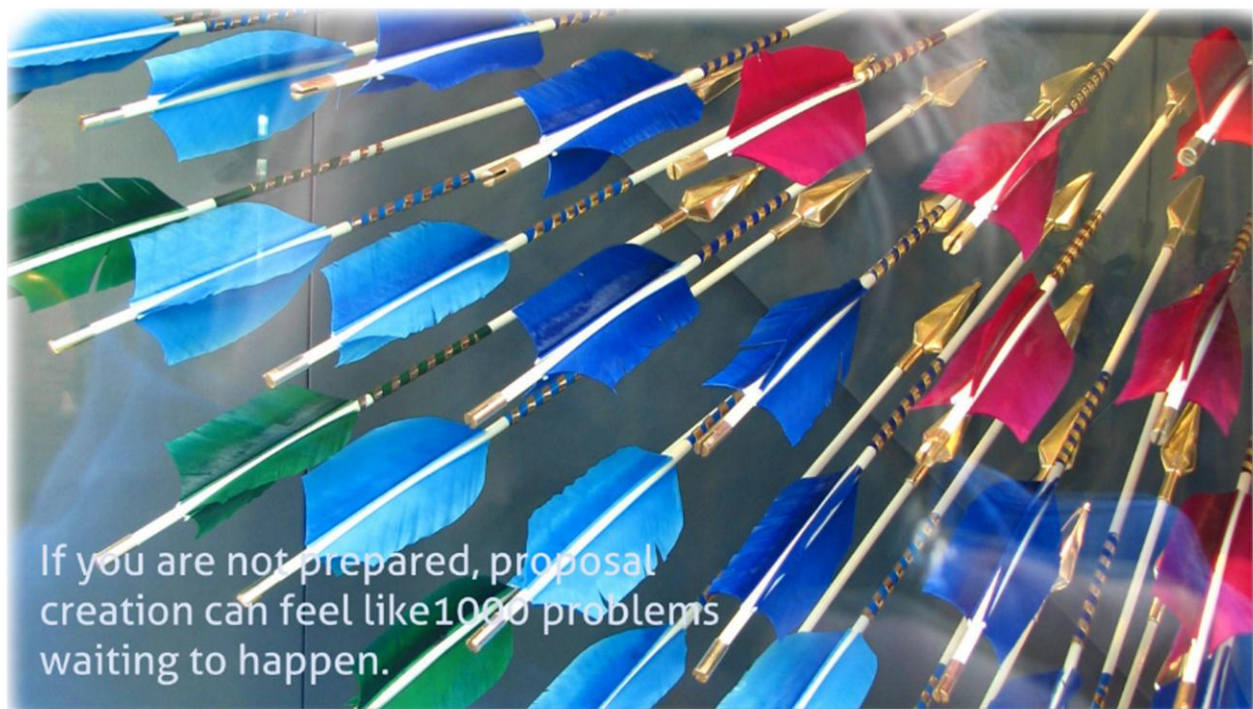
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## 1. The Challenge with reviewing and editing your proposal

Our target must be to create a compelling proposal that our customer clearly understands and really enjoys reading. How do we expect to achieve this unless we stop writing, review our content, and then decide on the improvements?

Often, we start with good intentions and have a proposal plan that allows for adequate reviewing and editing. As soon as we run into issues in developing our proposition, the easiest decision is to cut back on the reviewing.



**As Bid and Proposal Managers, we must predict the problems and ensure they do not affect the quality of the proposal.**

When we run into time constraints, we just move all the reviewing and editing to the end of the proposal creation project. The challenge is that if you are already running late, then the chances are that you will also be running late at the end stage of the project. We end up in not having enough time to do the reviewing and editing that the proposal needs.

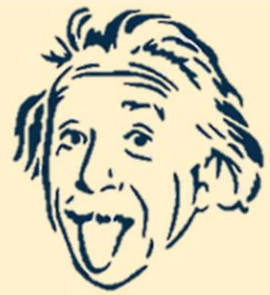
However, we do send the document on time. Bid teams celebrate this achievement. Bid Alchemy do not see this as success; it is what we are here for. It is a false celebration as what we have done is sacrifice quality to meet the deadline.

We cannot send a proposal in late. This can lead to disqualification and can be career limiting for the Bid Manager.

# How organisations make the buy decision.

Bid Alchemy are not fans of asking customers for extensions. Sometimes, when a competitor request an extension, it gives relief. If this does happen to you, do not go shouting around the office about it. Team members may take this a possibility to take the foot off the pedal. The extension is your contingency unless you give it away. You should also, ensure the customer is aware that you do not need this extra time, even when you do. If we cannot produce a high-quality proposal in time, how little confidence the customer can have in our ability to deliver the more complex proposition to their deadlines.

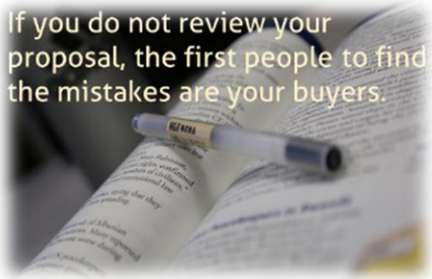
If you keep working late on your proposals and are never happy with the result, then maybe it is time to do something different.



*Insanity is doing the same thing, over and over again, but expecting different results*

When the team is celebrating meeting the submission deadline, the Proposal Manager or final editor who is usually quiet. They know all the things that did not have time for that would have

If you do not review your proposal, the first people to find the mistakes are your buyers.



made the proposal clearer and more compelling. They are the only person who has read the document that we have sent to the customer. If we do not review our proposal then the people who will find all the mistakes is the buyers.

Time limitations cannot be the reason we do not review and edit our proposal. We need to implement an approach to ensure that we can review and improve our proposal

throughout the project.

## Bid Alchemy's dubious history of the British car industry

Britain used to have an enviable car industry. British cars were known for their quality, selling around the world. They were not cheap, but cars were not then. Each was effectively hand made.

After the 2<sup>nd</sup> world war, Japan had to re-invent itself and grow industries to ensure that the country could rebuild and prosper. They began building cars for export. They built on factory lines, using cheaper materials. The result was low cost cars, opening the market to a wider audience. However, the cars had problems and rusted. Japan got the reputation for cheap and nasty cars.

They had a rethink and brought in quality control. At each stage of the build, they would inspect the car and resolve any problems found. At final inspection, they would find very few issues.

Their reputation began to change. Soon they were known for cheaper quality cars and they started taking market share from the traditional British manufacturers.

The appeal of Japanese cars continued to grow, and soon British manufacturers were going out of business.

To save the British industry, the government combined these manufacturers into a national car manufacturer. They realised that they had to evolve to adopt the practices within Japan, so they brought in automation and a final quality check to ensure that all cars were inspected before sending to the customer.

# How organisations make the buy decision.



They did not undertake quality reviews at each step of the build. Cars came to the final inspection with problems. They did not have time to fully repair the problems as they needed to keep the supply to their garages and customers. Cars left with “bodges”. The customer soon discovered these.

So now the British car industry had the reputation as being nasty cars, not so

cheap. And the industry never recovered and finally the national manufacturer went bankrupt. Now Britain has a small car industry, often manufacturing quality cars for the Japanese companies. **Do not let your proposal become a nasty British car.**

The Bid Alchemy approach to reviewing and editing, includes quality review points that feed the actions to improve the proposal. This ensures that there are less issues at the Final Review and thus we send our proposal, it is one we are proud of.

The Alchemy approach includes four proposal reviews, with opportunities to find actions to improve your proposal.

These reviews are:

- ☰ Get to Go Review
- ☰ Editorial Review
- ☰ Final Review
- ☰ Print and be Damned

You also need to include a RED Review.

Each of these reviews is for a separate purpose. This guide discusses these, as well as how you should conduct the review. Bid Alchemy supplies tools to support you in undertaking the reviews.

Following the reviews, you will have actions to resolve problems and improve the quality of your proposal. You will find actions for the Proposal Manager for editorial improvements as well as improvements for the Content Writer.

## 2. The four reviews you need to produce high quality proposals

To manage the creation of your proposal, Bid Alchemy recommend building five reviews, including RED, into your project plan. This is irrelevant to how long to the length of time you have, the number of people in your team, the complexity of the proposition or the size of the document. Bid Alchemy use this approach on every bid. Our experience shows that it works for the highest value deals ever for organisations, the largest size proposal (a quarter of a metric ton) and multiple small value deals at the same time.

Like the British car industry story, could you imagine your organisation creating a new product or developing a service for a customer without quality review points?

The proposal is the product we are aiming to create and so it should follow the same approach. To support this, the approach that Bid Alchemy use is akin to that used by publishers.



**To ensure that you produce the proposal you wanted, you need to stop writing and start reviewing five times.**



*Hope is for the  
hopeless.*

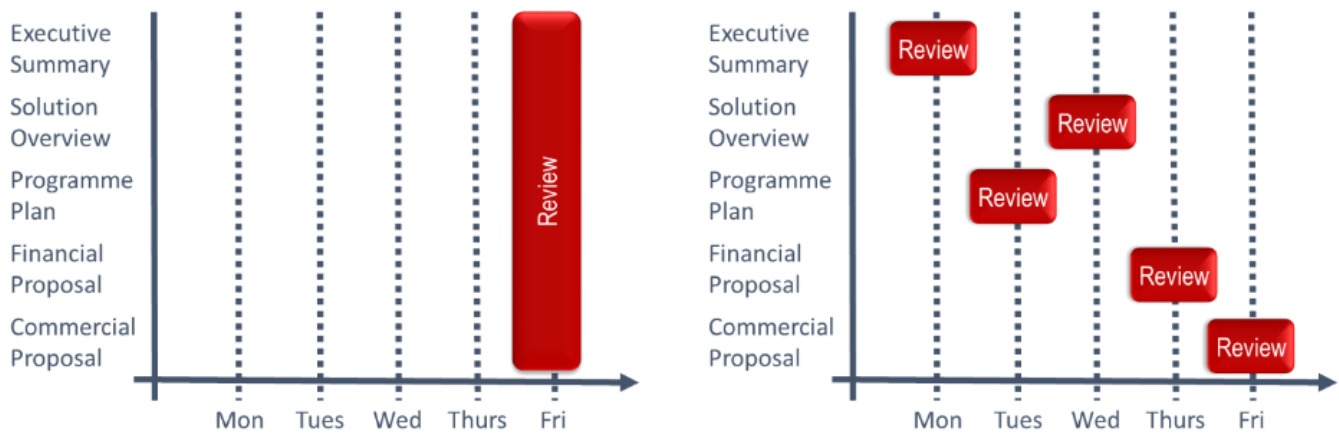
*That is why we never  
rely on hope in our  
bids.*

If we set off with a mindset that the planned reviews will not happen, then they will not happen. Certainly not with the rigour you know you need.

It only takes one Content Writer not achieving the deadlines for the reviews to fail. When we get into writing the proposal, some questions will be more difficult to answer than others. This enables you to schedule when sections will be ready for review. Rather than saying that the Editorial Review will be on Tuesday, work out when

each section will be suitable for review and set the Editorial Review Day for each section (A few on Monday, most on Tuesday and the remainder on Wednesday). This approach reduces the pressure on the reviewers and reduces the delays to the Content Writers. It also saves on arguments that can happen when a section has an unnatural early review date.

# How organisations make the buy decision.



By setting review dates by section, you reduce pressure and delays.

The **Bid Alchemy Proposal Content Tool** enables you to attribute dates for the review of each section. This effectively becomes a visible plan you can share with your bid team.

| Alchemy Content Toolkit Review Timetable |                                                               |                  |                  |                  |            |              |             |  |
|------------------------------------------|---------------------------------------------------------------|------------------|------------------|------------------|------------|--------------|-------------|--|
| Section                                  | Title                                                         | Content Owner    | Get to Go Review | Editorial Review | RED Event  | Final Review | P&bD Review |  |
| 1                                        | Award winning service at 20% less cost                        | Sam Sales Person | 13/07/2021       | 01/08/2021       | 08/08/2021 | 14/08/2021   | 18/08/2021  |  |
| 2                                        | Flexible Service that drives continuous improvement           | George Service   | 14/07/2021       | 02/08/2021       | 08/08/2021 | 15/08/2021   | 18/08/2021  |  |
| 3                                        | Driving down your costs whilst delivering higher quality      | Pete Improvement | 15/07/2021       | 02/08/2021       | 08/08/2021 | 15/08/2021   | 18/08/2021  |  |
| 4                                        | Confidently meeting and beating your deadlines                | Gene Project     | 13/07/2021       | 03/08/2021       | 08/08/2021 | 15/08/2021   | 18/08/2021  |  |
| 5                                        | Delivery a service that enables your organisation to succeed. | Sam Sales Person | 15/07/2021       | 03/08/2021       | 08/08/2021 | 16/08/2021   | 18/08/2021  |  |

The Alchemy Content Toolkit enables you to assign content to owners and then apply review dates that the Content Writers can see and agree with.

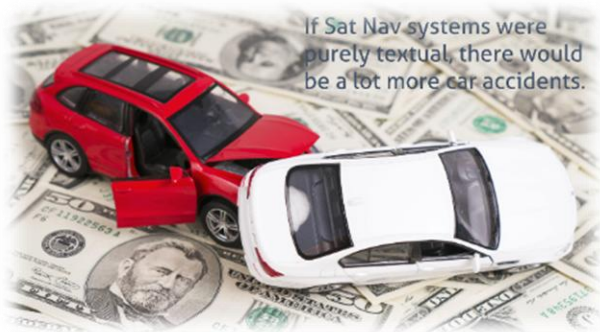
Bid Alchemy recommend and assume that you will be undertaking storyboarding before you set your Content Writers off writing. The storyboard is effectively the blueprint for your proposal. Just remember the old adage, “*if you do not have a blueprint, then you only know you are finished when you have run out of time*”.

The following chapters gives the Bid Alchemy approach to managing these reviews. The Bid Alchemy “**How to improve the quality of your proposal**” guide supports the changes that your reviews indicate as important.

## 2.1. The Get to Go Review

This is a quite simple and rapid review. Depending on whether you are willing (as a Bid or Proposal Manager) to work into the evenings, it does not need to delay the Content Writers at all.

### Purpose of Get to Go Review

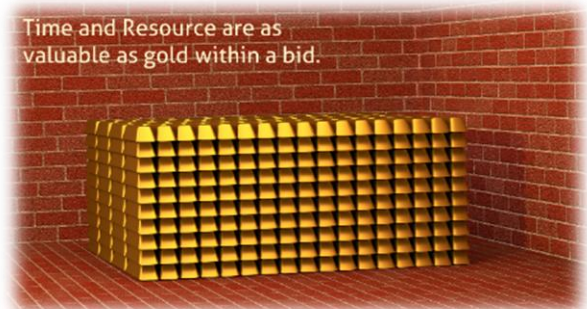


Bid teams can undertake a good storyboard exercise and define the proposal well. They allot ownership to sections and then they leave the Content Writers to do their magic. The Bid or Proposal Manager then does not see the results until the RED Event.

What happens if a Content Writer has been developing the wrong content? If the Project Manager has been diligently building an approach that they have confidence will work and yet it is longer than the buyers expect. It may be a Content Writer who has been heads down developing their text and graphics and has forgotten the storyboard.

If we do not review until they have developed much of the content, then we have a more significant task to rewrite the text. We risk upsetting the Content Writer and there is a waste of time. Time and resource are the most valuable elements within the alchemy of bidding.

The Get to Go Review is just to ensure that the Content Writers are starting on the right foot, heading in the right direction.



### Approach to Get to Go Review



We set and agree early dates for the review of each section. This should be shortly after you provide the Content Writers with their storyboards. By doing this review early, you also gain the benefit of starting the Content Writers to look at writing text. This is a little bit of bid psychology. Your Content Writers are more comfortable in

# How organisations make the buy decision.

creating their part of the proposition and so this will become their priority. When they just focus on the proposition, it is difficult to lever them into writing.

You need the Content Writers to provide you with their proposal templates with bullet point, annotated notes and perhaps rough graphics detailing what they plan to write in that section and sub-section. If there is the start of text, even better.

This now becomes an aide memoire for the Content Writers for when they take on the challenge of writing.

As Bid and Proposal Managers, you review this against the storyboard to ensure that it is heading in the right direction. If you can get the Sales Professional involved in this, it can help (they effectively own the proposal for the customer).

If the Content Writer is heading in the wrong direction, then now is a good time for a chat with them. It will certainly be less contentious now that after they have spilt blood crafting the perfect response, in their mind.

You discover that they have good ideas that are not in the storyboard. Never waste a good idea, you can amend the storyboard to improve it.



You will also get a good idea on whether they will achieve the word or page count, and again you can either allow this increase or discuss how to reshape their ideas.

Bid Alchemy's approach is to hold these reviews over days, reading the frozen sections and commenting in the evening. At the start of the next day, you can discuss the findings with the relevant Content Writer, and they can head

on in the right direction. They, and the bid, have not lost time for this review.

## Result of the Get to Go Review

- Content Writers now have annotated sections and sub-sections acting as an aide memoire
- You increase confidence that the proposal is developing as you want
- We capture good ideas and improve the storyboard
- Early detection of errors that do not become unresolvable problems later
- We have focused the Content Writers on writing as well as developing the proposition
- The bid does not lose any time

## 2.2. The Editorial Review

This is a formal review of your proposal during creation. You do require your Content Writers to stop working on their sections during the review. Otherwise, the comments made, will not necessarily apply to the updated text. For this review to be successful, you need much of the proposal to have at least first drafts of text. It certainly needs and should be more than bullet points.

### Purpose of Editorial Review

The Editorial Review enables you to find and implement improvements to your proposal before it undertakes a RED Review.

Not undertaking this review means that the reviewers at the RED Event, will spend their time, trying to decipher what your proposal is trying to say. The RED Event will supply negative feedback concerning the grammar and spelling rather than the important suggestions to increase the compelling nature of the proposal.

It will also damage your reputation within their eyes.

The purpose of this review is:

- ➊ Be confident that your proposal is going to be suitable for the RED Review
- ➋ Ensure that the content is developing in as the storyboard depicts
- ➌ Measure progress and give confidence that you can produce the proposal you wish, within the deadlines
- ➍ Create a series of actions to resolve the identified issues



## Approach to Editorial Review

There is no magic formula to finding the best date for your Editorial Review. It will depend on the complexity of your proposal, your reasonable expectations as to when the Content Writers can provide you with the majority of their draft responses and the time available to you to produce the proposal.

Whatever dates you select, Content Writers may gulp and suggest it will be impossible. It may be that the Content Writers are happier working on the proposition and leaving the writing to the end. Allowing this to continue does not enable you to be confident that you will be able to produce the quality of proposal you plan or need. You do need to be listening to their concerns but also strong in ensuring the Editorial Review takes place and adds value to your proposal. It does help to remind the Content Writers that you are not looking for perfect responses yet.

You should consider the following factors:

- ☰ There is adequate time between the Editorial Review and the RED Event to implement the improvement actions
- ☰ There is enough time between the Get to Go Review and the Editorial Review for the Content Writers to be able to script their 1<sup>st</sup> draft responses
- ☰ It takes place somewhere around the halfway point of the time you have for your proposal creation project

Often the reviews evaluate the proposal in isolation to any other material. This may result in the reviewers reading the document and marking it using their preferred reading style. This is not necessarily going to be the style your customer is most receptive to.

When you are using multiple reviewers, they can have conflicting views. Sitting in the middle of this, we need to make the decisions on which advice to follow. Please avoid risking selecting the advice that is supportive of our preferred reading style.



**When you just ask reviewers for their comments on your proposal, you can expect it to be a challenge for you to apply them all.**

# How organisations make the buy decision.

In the Bid Alchemy approach, we give the reviewers the storyboard and any documents detailing the writing style and rules that you want applied on this proposal.

However, what you are really asking the reviewers to do, is to comment on the quality of your draft proposal. The problem with this, is these comments are subjective, and you cannot measure subjectivity.

The **Alchemy Proposal Toolkit** resolves this challenge. There are other documents from Bid Alchemy that describe the toolkit, how to use it for reviews and how to find improvement actions. A summary of the approach and value for the Editorial Review is in the following text.

## Enabling you to measure the quality of your proposal and increase your wins

The **Alchemy Proposal Toolkit** follows unique Bid Alchemy thinking. We believe that you can measure what has previously been subjective. Bid Alchemy identify the key attributes of a high-quality proposal. You may see similar approaches from other organisations.

These attributes alone are subjective. We can all have a different idea on what makes a clear document, for example.

Bid Alchemy break each of the attributes down into the components that form it.

You may find guides and methodologies that provide descriptions of similar factors.

The challenge is that this remains subject, for example, I know that grammar and spelling is important for a clear document, but what I think is good may differ to you.

Each component breaks down into elements.

These are not just things that Bid Alchemy believe are there, these come from the science of reading. They come from feedback and Best Practice.

By breaking down the proposal into its elements, you can evaluate at the lowest common denominators. This enables the assignment of values at an element level that builds up into the evaluation scores for the components, attributes, and proposal quality.

By using this approach, you can see the current quality of the proposal and when to focus on improvements.

The result is a higher quality proposal which the customer finds more engaging and compelling. This delivers a higher evaluation score and an increase to your win rate.

Use of this approach results in winning deals that you could have lost. You did not lose them because of price or quality of proposition, although these may be the reasons you currently accept. You lost because your proposal did not convince the customer that the quality or higher price leads to a better selection decision.



# How organisations make the buy decision.

| Alchemy Proposal Toolkit 1st Review |     |     |                        |                     |                       |  |                     |                       |
|-------------------------------------|-----|-----|------------------------|---------------------|-----------------------|-------------------------------------------------------------------------------------|---------------------|-----------------------|
| CONFORMANT                          |     | USE | SCORE                  |                     |                       |                                                                                     |                     |                       |
| Conforms to Requirements            | Yes | 1   | Page Count             | Layout              | Format                | Naming Convention                                                                   | Submission          | Other Requirements    |
|                                     |     |     | Very Poor              | Very Poor           | Poor                  | Poor                                                                                | No Evidence         | No Evidence           |
| Answers Questions                   | Yes | 2   | Excellent              | Clear               | Explains how          | Details Benefit                                                                     | Provides Evidence   | Additional Features   |
|                                     |     |     | Very Good              | Poor                | Good                  | Poor                                                                                | Good                | N/A                   |
| Understanding of Requirements       | Yes | 1.5 | Good                   | States their needs  | Addresses their needs | Details value                                                                       | Consistent benefits | Provides Alternatives |
|                                     |     |     | Poor                   | Good                | Very Poor             | Very Poor                                                                           | Very Poor           | No Evidence           |
| Easy to Evaluate                    | Yes | 1   | No Evidence            | Key information 1st | Compliance obvious    |                                                                                     |                     |                       |
|                                     |     |     | N/A                    | Very Poor           | Very Poor             | Very Poor                                                                           |                     |                       |
|                                     |     |     | 1.4                    |                     |                       |                                                                                     |                     |                       |
| CLEAR DOCUMENT                      |     | USE | SCORE                  |                     |                       |                                                                                     |                     |                       |
| Key Elements                        | Yes | 1.3 | Short sentences        | Customer language   | No excess words       | Active voice                                                                        | Positive writing    | One voice             |
|                                     |     |     | Poor                   | Very Poor           | Very Poor             | Very Poor                                                                           | Poor                | Very Poor             |
| Grammar and Spelling                | Yes | 2   | Grammar Quality        | Grammar Consistency | Spelling              | No wrong words                                                                      | Simple words        |                       |
|                                     |     |     | Very Poor              | Very Poor           | Good                  | Very Poor                                                                           | Very Good           |                       |
| Other Factors                       | Yes | 2.5 | Cross-referencing      | Structure & flow    | Introductions         | Free of ambiguity                                                                   | No stereotypes      | Confident tone        |
|                                     |     |     | Good                   | Poor                | Good                  | Very Poor                                                                           | Very Good           | Poor                  |
|                                     |     |     | 1.9                    |                     |                       |                                                                                     |                     |                       |
| ENTICING DOCUMENT                   |     | USE | SCORE                  |                     |                       |                                                                                     |                     |                       |
| Reading Style                       | Yes | 2   | Enjoyable read         | Learn for it        | Distinctive voice     | Relevant to customer                                                                | Everyday words      |                       |
|                                     |     |     | Very Poor              | Poor                | Poor                  | Good                                                                                | Poor                |                       |
| Reading Power                       | Yes | 2.5 | Thought provoking      | Credible            | Commitment evident    | Evokes emotions                                                                     |                     |                       |
|                                     |     |     | Good                   | Good                | Poor                  | Poor                                                                                |                     |                       |
| Proof                               | Yes | 2.7 | Credible case material | Independent proof   | Relevant facts        | Accurate facts                                                                      | Current facts       | Persuasive            |
|                                     |     |     | Good                   | Poor                | Poor                  | Good                                                                                | Very Good           | Poor                  |
|                                     |     |     | 2.4                    |                     |                       |                                                                                     |                     |                       |

The toolkit uses guidelines to enable you to measure the quality and apply the right actions to improve.

Bid Alchemy supply the “How to improve the quality of your proposal” which enables you to gain a better understanding of this unique approach

Prior to the review, and ideally at the time of storyboarding, you decide on the quality level you wish to achieve for the proposal. You do this by applying targets to each of the eight attributes.

For this review, we ask the reviewer to read the proposal and then decide on the quality level for all the elements. They may need to keep referring to the draft proposal to ensure that they apply the right measurement. You can also provide them with the **Alchemy Proposal Toolkit Scoring** guide to aid their thinking.

The toolkit can compute these into scores for the components and roll this up into the attribute.

You can now see the quality level of the proposal and for each of the attribute and the delta to your targets. This enables you to make confident decisions on the actions that you need to undertake before the proposal is ready for the RED Event.

You decide whether an action the Content Writer or someone else is most suitable to own the action. If the issues are around conformance, clear or enticing document, you may want these actions to be undertaken by someone who is an expert in writing rather than the subject of the text.

You can also ask the reviewer for their subjective views. The great thing for you, is that you are not just dependent on this, you have the measurement of quality to rely on.

## Alchemy Proposal Toolkit Dashboard



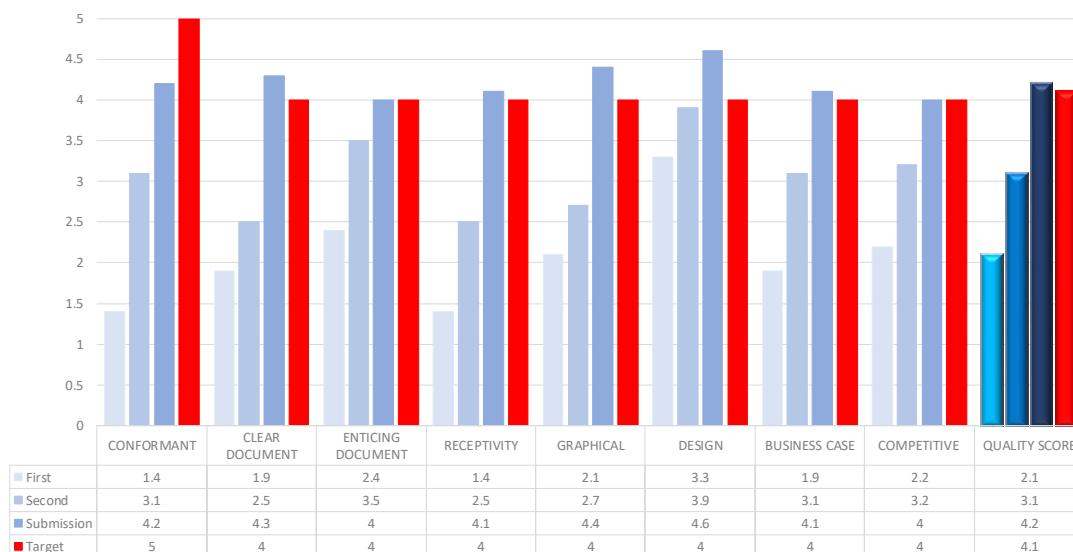
Proposal Name

Acme Widget Requirements

Submission Date

13/07/2020

### Alchemy Proposal Quality Chart



The Alchemy Proposal Toolkit enables you to find areas to improve for your proposal.

The toolkit enables you to deploy it twice during proposal creation and to gain a proposal quality score for the document you send.

If you undertake this approach across all your proposals, you can find common low scores and by doing so, implement an improvements programme for your presales team. The use of this toolkit increases the quality of proposals each year. This increases in quality were an increase in win rate.

## Alchemy Proposal Toolkit Dashboard



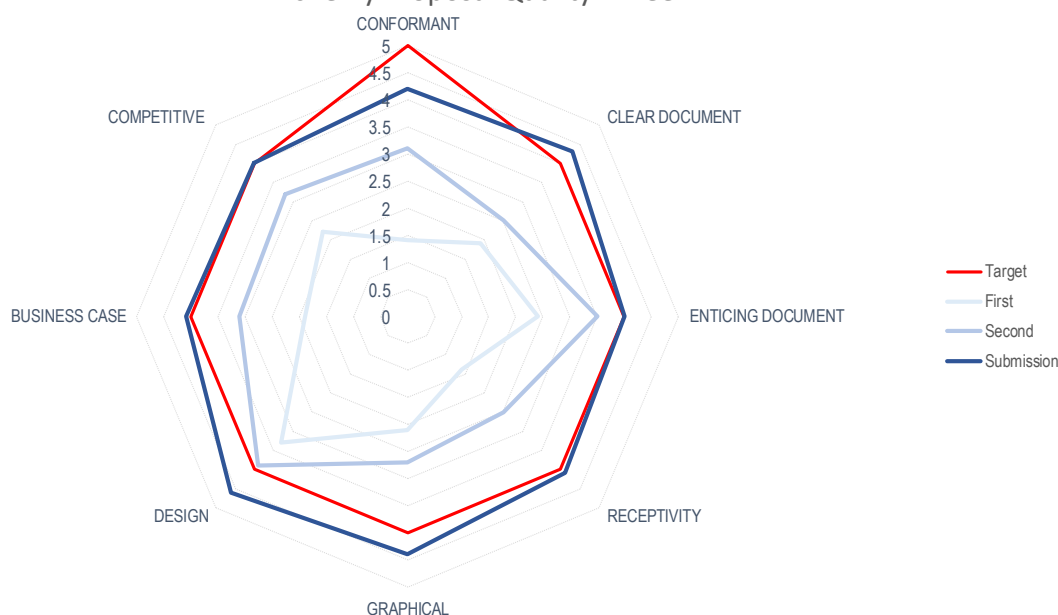
Proposal Name

Acme Widget Requirements

Submission Date

13/07/2020

### Alchemy Proposal Quality Wheel



The Alchemy Proposal Quality Wheel enables you wish to discuss the current state of your proposal with the bid team.

## Result of the Editorial Review

- ☰ Measurable quality for your proposal that supports the actions needed before the RED Event
- ☰ Graphical depictions of the current quality status that you can discuss with the bid team. This supports them in understanding the need to improve
- ☰ A series of actions to improve that are in accordance with improving the quality of your proposal
- ☰ Ability to decide who is the best person in your team to own each action
- ☰ Confidence that your proposal will be suitable for the RED Event

## 2.3. The RED Review

Bid Alchemy supply a guide and approach to the RED Review. Within this document we give a summary to save you jumping between documents.

The RED Review or event is a term that I hear regularly in bid teams. The name is not just the assignment of a colour to a review. What is surprising is that a good number of those who mention it, understand the purpose. The most common definition that people give is that it is an Editorial Review of the proposal before submission to the customer. This is wrong. Please help in educating people to the real purpose and power of the RED Review.

### The Mad Red Reviewer

I was managing the largest deal a company had ever won. It was a two-and-a-half-year challenge with all the pressure that a deal that size places onto the bid team.

We worked entirely to Best Practices and created an excellent proposal (14 folders in size). We worked tirelessly in producing the best proposal possible. We storyboarded every question and had a team of editors continually improving the quality of each response. The whole team were working 12 to 18 hour days to get the job done. Tiredness tends to increase the madness in a bid team but it was not until I had a RED Reviewer shouting at me that she could not do her job as she did not have a red pen. Although, I was young and early in my career, I realized that now was not the time to tell her that RED is not a colour!

### Purpose of RED Review



The RED Review is a formal event where the proposal undergoes a structured review.

The reviewers should not be people who have worked on the development of the proposal. Usually, they are senior members of your organisation who are acting as if they are the customer.

They are judging the compelling nature of the proposal and finding issues with it that may cause your organisation issues with the contract. You do not want them reviewing the quality of writing; this is a waste of their time.

The reviewers should function as if they are the buyers. If you have a number of technical sections that will be read by technical buyers, then they should also be RED Reviewed by reviews with a similar technical ability. The closer the match, the more powerful the review will be.

The reviewers will provide you with suggestions on improvement. The **Alchemy RED Review toolkit** is available for you to capture these improvements.

This is where the power of the RED Review. By collating these suggestions, you have an action list for completing your proposal. Except for the Proposal Manager or writer editing the proposal into one voice, any other changes are not by the RED Review. If you think about it, if the reviewers did not comment, why do you feel the need to change the proposal? Proposals can reduce in quality by changes after completion of the RED Review improvements. Bid team members read the

# How organisations make the buy decision.

proposal and feel the need to change their content. It is always tempting to do. These last-minute changes create problems within the proposal. We change something in one section, and it may have knock on effects in others.

The RED Event is tests the quality of your proposal with a team representing the customer and their suggestions become the blueprint for completing it.

| Alchemy RED Review Toolkit Review form                                            |  |                       |                                                                                                                              |  |                                                                                                                      |  |  |
|-----------------------------------------------------------------------------------|--|-----------------------|------------------------------------------------------------------------------------------------------------------------------|--|----------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|--|
|  |  | <b>Must change.</b>   | This is factually incorrect, significantly diminishes the compelling nature of the proposition or causes a contractual risk. |  |                                     |                                                                                     |  |
|  |  | <b>Should change.</b> | Missing or incomplete answer, difficult to understand, can increase the compelling nature of the proposition.                |  |                                     |                                                                                     |  |
|                                                                                   |  |                       | <b>Observation.</b>                                                                                                          |  | This can be improved without major effort. This may be my preference and not relevant to the proposal quality.       |                                                                                     |  |
|                                                                                   |  |                       | <b>Grammar.</b>                                                                                                              |  | The use of grammar can be improved. Complex words are used or words are used incorrectly. The spelling is incorrect. |                                                                                     |  |

| Page | Section | Text starts with              | Status                                                                            | Issue                                                        | Advice                                                                | Actioned                                                                            |
|------|---------|-------------------------------|-----------------------------------------------------------------------------------|--------------------------------------------------------------|-----------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| 3    | 1.1     | We guarentee to               |  | Do not use guarentee it is a commercial term                 | Change to sentence to We will provide a                               |  |
| 5    | 1.6     | The widget machine is         |  | Not a complete answer, does not talk about production module | Include a description of the production module as we are providing it |  |
| 12   | 2.1     | The system will undertake     |  | Seems to be in 3rd person and slips into past tense          | Suggest rewrite in accordance to writing guidelines                   |  |
| 15   | 2.2     | The ending result is that the |  | Poor grammar in the use of "ending"                          | change                                                                |  |
|      |         |                               |                                                                                   |                                                              |                                                                       |                                                                                     |

**The Red Review Toolkit creates the blueprint for completing your proposal.**

## Approach to RED Review

You should select the ideal members of your RED Review team early to have the best opportunity of them being available. Ideally, they should each be a match to the buyer in terms of technical ability and reading style.

When a reviewer agrees to take part, you should provide them with information relating to your proposal and the bid. This is so that they can give themselves with the relevant factors of the opportunity. I suggest that the following information is suitable

-  Deal Summary, so that they can understand the opportunity, the customer requirement and competitive landscape
-  Storyboard, so that they can understand the metrics of the proposal you are aiming to produce
-  Customer briefing, ideally so that they can understand the needs, wants, worries and concerns of the individual buyers. The more details on the buyer reading style and skillset you can supply, the better the review can undertake their role
-  Proposal Creation Project timescales, so that they can understand the time available to you to undertake improvements post the review

You should also inform them of the approach you wish them to take to reviewing the proposal, for example providing them with the Alchemy RED Review form.

# How organisations make the buy decision.



You also need to inform them of the sections you wish them to review and how long you expect the task to take them.

Unless your proposal is short (less than 50 pages) you should not want each reviewer to read and comment on all of it.

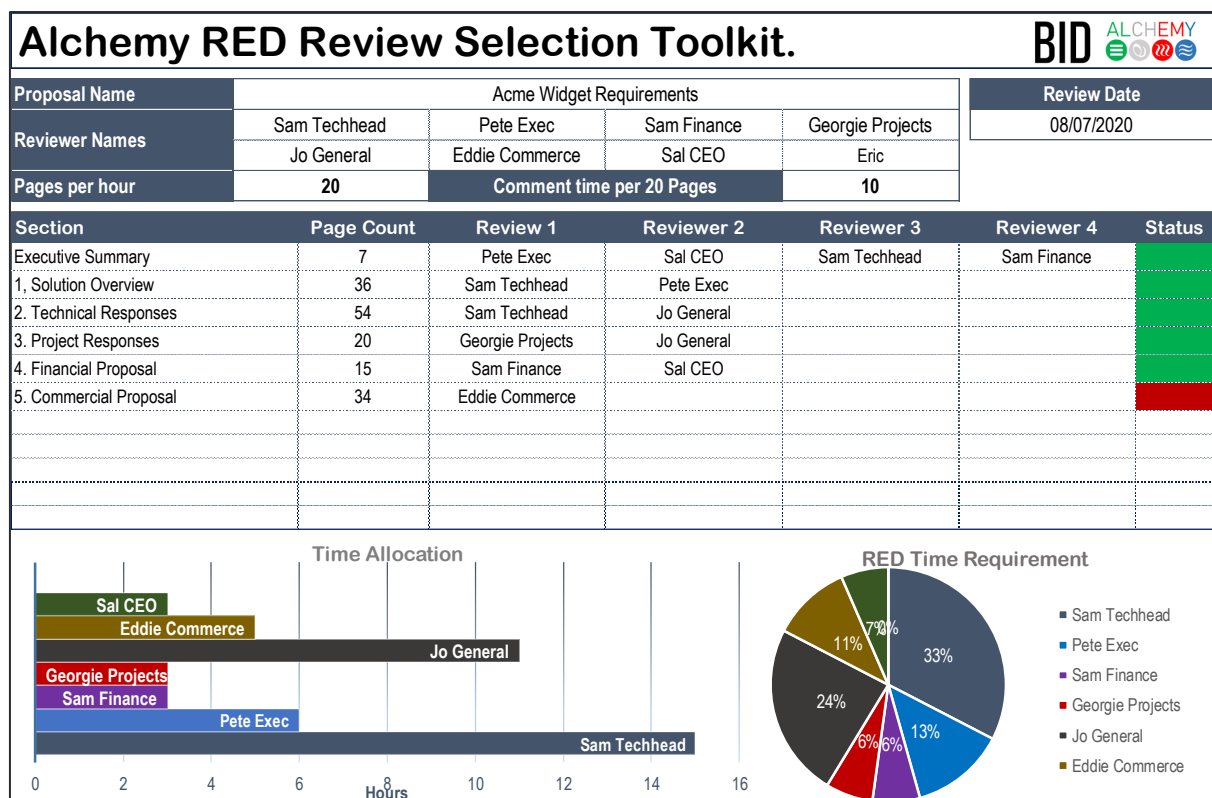
You need to select which sections are most right for each reviewer to read.

Bid Alchemy supply the **Alchemy RED Review Selection Toolkit** to enable you to do this.

Select the sections for each reviewer, based on:

- ⌵ Time, they have available to review
- ⌵ Ability and which sections the associated buyer will be most interested in
- ⌵ Each section of the proposal having at least 2 reviewers

Using the **Alchemy RED Review Selection Toolkit**, expect the reader to review 20 pages in an hour. It will take them 10 minutes to supply their comments for 20 pages. If you expect a reviewer to read 30 or more pages, then you risk them scanning the sections so that they can complete the task in the time they have available.



The Alchemy RED Review Selection Toolkit gives you confidence that you are not overloading any reviewer and that each section is adequately reviewed.

# How organisations make the buy decision.

Prior to the review, it is good practice to check in with each reviewer to ensure that:

- ③ They still have adequate time to perform their reviewing responsibilities
- ③ They are aware of the date(s) you require them to perform the review
- ③ They have adequate information on the deal and our expectations of them
- ③ You are aware of how they wish to receive the proposal

On the day of the review, provide them with the proposal or relevant sections, and they undertake their reviewing responsibilities.

At the end of the review, it is good practice to talk with the reviewers. It is best if you can have a meeting with all, but you can contact them individually. Gather their overall reviews. There may be comments that they wish to make, that they did not want to document. Thank them for their participation.

Collate the review comments. As a team (usually Bid Manager, Proposal Manager and Sales Professional), you decide on which of the comments to action and who should own each action. This action plan is your blueprint to complete the proposal.

## Result of the RED Review

- ③ You can have confidence that you have the correct action plan to improve the quality of your proposal
- ③ You have the blueprint for completing the proposal creation project



The RED Event captures an average of 7 errors that may cause you to lose or win a bad contract. That is the power of this review.

## 2.4. The Final Review

As the name suggests, this is the last formal review of your proposal that will result in editorial changes to the document. It is particularly important that you hold the advice from the earlier chapter. This is not a review that should amend the proposition or to the approach taken in the proposal. Any significant changes now will be breaking the advice of the RED Review.

### Purpose of the Final Review

After completing the RED Review comments, you can be confident that the proposal has developed as they have considered suitable.

Now is the time to ensure that the proposal is as easy to read, as enticing as possible and reads in one voice.

A writing expert (usually the Proposal Manager) in full control of the document, is the best approach.

This may sound easy, but often the Content Writers think they find major holes that only they can fix. They are not correct, it is just they have lived with creating their sections for so long, that they find it hard to let go. This can get quite emotional but remember the rationale. The Proposal has undertaken reviews which did not raise this issue. The RED Reviewers may have suggested other changes that now make this look like a hole to the Content Writer.

The quality of proposals can reduce by allowing these other changes, it may:

- ③ Change the commercial or financial proposition
- ③ It may have knock on effects to other sections, so the proposition may now seem confusing to the customer
- ③ They are often poorly written and can be complex for the reader to understand
- ③ The Proposal Manager or writer cannot undertake their “magic” to improve the readability of the proposal while these changes are being undertaken, so we can time out on the editing of the document that would lift its quality



## The angry Sales Professional who would not accept the word no

I was Bid Managing a deal. We worked well, as a team, until the final night. The Proposal Manager was busy undertaking the final edit and I was busy printing and filing the completed sections.

Then the Sales Professional came back (after a couple of hours in the pub). They had a great idea for improving the offer and we had to change the Executive Summary. I explained that the changes effected the offer, so would need governance approval. He would not accept this. I explained that the change would then need changes to other sections, sitting proudly in the proposal folders. He would not accept this. I explained that we would need to need to reformat, edit and print the proposal again and with the speed of our printers, there was now a risk we would miss the 7am courier. He would not accept this. *“I am the Sales Professional, it’s my deal and, I make the decision.”*

Fortunately, this was in the olden times, before we had laptops or even PCs. We worked with what “Intelligent Terminals”. One bit of the intelligence is that the terminal would only work with one keyboard. I let him rant, unplugged his keyboard, ran, and hid it. He screamed and shouted; he threatened my career. I just smiled and continued with the printing and packing.

To his credit, he apologized later, much later when we won the deal.

## Approach to Final Review

The Bid Alchemy approach is that the Bid or Proposal Manager undertakes a review of the proposal text using the **Alchemy Proposal Toolkit**. Using the scoring from this, shows the areas of improvement. The aim is that each attribute should score at or above the target score you set.

The Proposal Manager takes ownership of all the content. They undertake editorial actions to improve the quality, as defined by the toolkit. They also ensure a consistent use of grammar and spelling across the document, so that it reads in one voice.

What we are really doing is asking this Proposal Manager or writer to perform their magic on the proposal. It is not magic; it is editing tasks that they need to undertake to lift the quality of this final

proposal. Given the time constraints, it is easy to forget these tasks.

Bid Alchemy provide the **Alchemy Final Editing Checklist** for you to tick off these tasks as they are done and also to identify which tasks should be prioritised, within the time limits to make the greatest improvements.



## Alchemy Final Editing Checklist.



| Proposal Name                                                                  | Submission Date              |
|--------------------------------------------------------------------------------|------------------------------|
| Acme Widget Requirements                                                       | 13/07/2020                   |
| Subject                                                                        | Completed                    |
| <b>House Keeping</b>                                                           |                              |
| 1 Two character spaces are replaced with one                                   | Yes, All Perfect             |
| 2 Standard English acronyms (eg and ie) and changed to e.g. and i.e.           | Yes, but a few issues remain |
| 3 Two paragraph breaks are replace with one                                    | Yes, but many issues remain  |
| 4 Select All, set proofing language to English (United Kingdom) or appropriate | Yes, All Perfect             |
| <b>Format</b>                                                                  |                              |
| 1 Headings are not in the bottom third of page                                 | Yes, All Perfect             |
| 2 Graphics are sized for easy interpretation                                   | Yes, All Perfect             |
| 3 Call outs are positioned professionally on all pages                         | Yes, All Perfect             |
| 4 Short paragraphs are not split across pages                                  | Yes, All Perfect             |
| 5 Correct paper type is deployed (A4, Letter etc.)                             | Yes, All Perfect             |

The checklist has a number of subjects that break down into tasks that need to be undertaken on your proposal to lift the quality.

# How organisations make the buy decision.

## Alchemy Final Editing Dashboard.



| Proposal Name       | Acme Widget Requirements |               | Submission Date                                                           | 13/07/2020 |
|---------------------|--------------------------|---------------|---------------------------------------------------------------------------|------------|
| Subject             | Score                    | RAG           | Advice                                                                    |            |
| House Keeping       | 2.25                     | Green         | Strongly advised to improve before submission                             |            |
| Format              | 3.00                     | Green         | Spend any remaining time on other subjects                                |            |
| 1st Editing         | 0.30                     | Red           | You must find time to improve before submission                           |            |
| Graphics            | 0.67                     | Red           | You must find time to improve before submission                           |            |
| Acronyms            | 1.00                     | Yellow        | If you have time, improve before submission                               |            |
| Lists               | 1.50                     | Yellow        | If you have time, improve before submission                               |            |
| Tables              | 1.67                     | Yellow        | If you have time, improve before submission                               |            |
| Contents Page       | 1.67                     | Yellow        | If you have time, improve before submission                               |            |
| Headers and Footers | 2.25                     | Green         | Strongly advised to improve before submission                             |            |
| Final Editing       | 0.67                     | Red           | You must find time to improve before submission                           |            |
| Final Activities    | 1.57                     | Yellow        | If you have time, improve before submission                               |            |
| <b>OVERALL</b>      | <b>1.50</b>              | <b>Yellow</b> | <b>Good to submit to the customer after a Print and be Damned Review.</b> |            |

## Alchemy Final Editing Dashboard.



| Proposal Name | Acme Widget Requirements |  | Submission Date | 13/07/2020 |
|---------------|--------------------------|--|-----------------|------------|
|---------------|--------------------------|--|-----------------|------------|



The checklist also contains a dashboard that enables you to prioritise which subjects we should focus on, within the limited timescales available.

## Result of the Final Review

- ☑ Confidence in the quality of your proposal as the quality score has increased
- ☑ Undertaken the tasks to improve the readability, enticing nature and one voice of your proposal
- ☑ Know that you have completed your proposal, as the checklist is green. Without this approach, you only know you have finished because you have run out of time

## 2.5. The Print and Be Damned Review



**If you do not do a Print and Be Damned Review, your proposal will have errors**

This is a rapid review prior to sending the proposal to the customer. People think that this is overkill. However, every Print and Be Damned review finds small mistakes that can be embarrassing to us.

These can be graphics that somehow have rotated themselves, strange page breaks and other irks that we do not pick up earlier.

### Purpose of the Print and Be Damned Review

The purpose of this review is to do a final check of your proposal before you send it to your customer. It is not to review the textual aspects of the proposal. It is to look at the missed errors that may. By finding them now, you can rapidly remove the errors and have confidence that the proposal you sent is the one you wanted to.



### Approach to the Print and Be Damned Review

If you are sending your proposal electronically, you still need to print at least one copy for this review.

You require one or more members of your bid team to perform the review. Skillset is not a factor for deciding who. It is best to select the people who are least tired.

- Each reviewer sits with a printed copy of the proposal and a pack of post it notes.
- You call out the page numbers, announcing each page with a 2 second break. "Page 1.....Page 2..... Page 3....."
- The reviewers look at that page and if they see something that does not look right, they put a post it-note next to the error.
- When you have completed calling out the page numbers, you just need to look at the post it notes and write a task list.
- The Proposal Manager then makes the corrections.

### Result of the Print and Be Damned Review

- You can sleep soundly knowing there are no silly errors in your final proposal

You have submitted a high-quality proposal to your customer that they will find easy to understand and enticing to read