

Bid Alchemy Best Practice

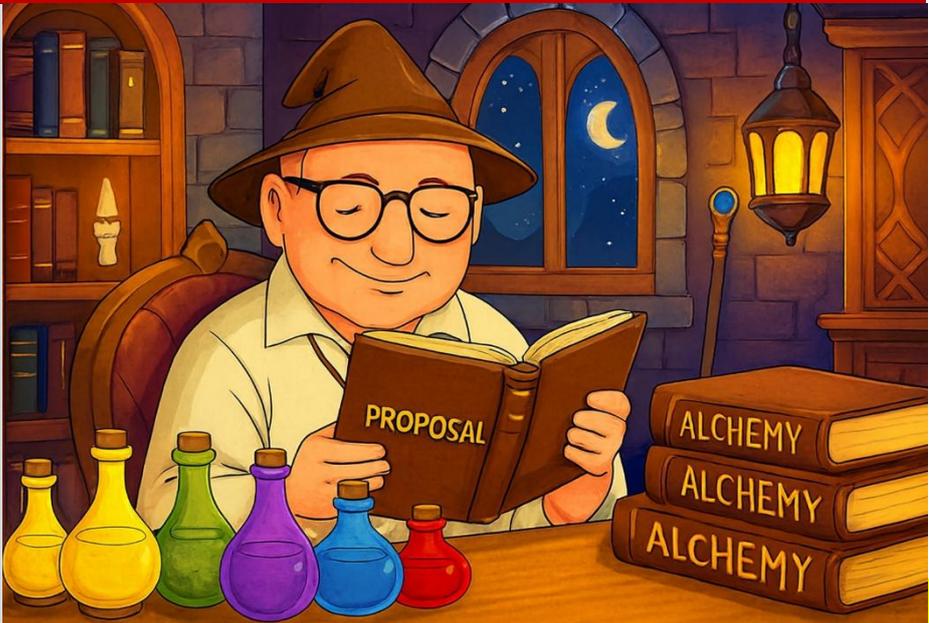


Alchemy RACI and workflow for Proposal Development
Ensuring that all members of the bid team are able to perform effectively due to their understanding of their Accountabilities and Responsibilities.

By Martin Eckstein

To enable bid teams to work collaboratively and effectively, all members must hold a common understanding of what and when needs to be done, who does it and who is responsible for its quality.

This is a generic approach that you may wish to deploy or amend for your organisation's best practices.



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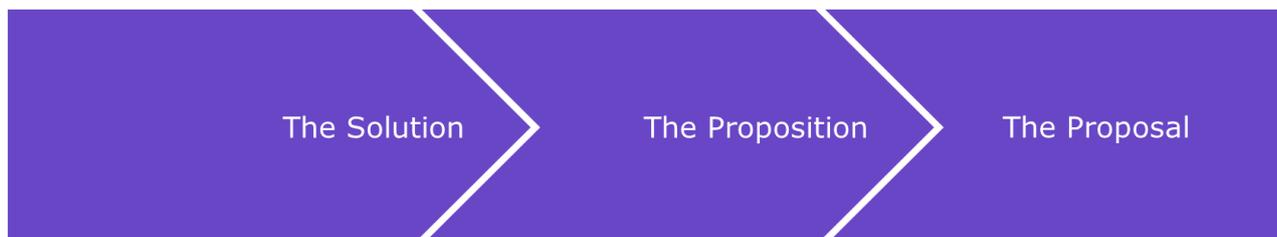
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1. What is a proposal?

A proposal is usually a document or set of documents that we create to compel a customer to procure from us. This may be either as part of a competitive procurement, where the customer has prescribed the format of our response or as a proactive exercise by our organisation to support a sales campaign.

While we often talk about a proposal, we do need to consider that there are three elements to each bid, of which the proposal is the result.



1.1. The Solution

We develop a solution to meet or exceed the customer's needs. These are stated within their requirements documents and / or gathered through our discussions with the customer.

The solution may be a service, project, or technical solution (or a combination of these) that is developed by SMEs deploying their best practices, approaches and tools. The solution is what we will be delivering to the customer, on award of the contract.

The solution is owned by a Service or Solution Lead who is accountable for it being fit for purpose and in accordance with our organisation processes and associated Best Practices.

1.2. The Proposition

The proposition is how we ensure that our solution is going to be compelling to the customer. This is how we message and present our solution so that the customer understands that it will resolve their business needs, provides tangible benefits that meet or better their goals, is delivered in manner that they desire and is more compelling than the propositions presented by the competition.

It covers the solution, the commercial aspects, and the financial aspects that together, enable the customer to evaluate and decide.

A great solution is unlikely to win unless it is made compelling by the proposition.

The proposition is owned by the Sales Owner for the bid who is accountable for ensuring that it is built on knowledge of the customer, those evaluating the proposals and the competitive threat.

1.3. The Proposal

The proposal is generally one or more documents that respond to the customer's requirements, embedding the proposition and detailing the solution.

The customer often details the format of the proposal, within their requirements documents. This may restrict us to the use of certain tools, page/word counts, use of graphics and structure.

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The proposal must be clear to understand, easy to read and compelling for the customer to award us the highest evaluation points that the solution and proposition enable.

The proposal is owned by the Bid Manager who is accountable for ensuring that the Bid Team are able to develop their responses in an effective manner through the deployment of Best Practices.

RESPONSIBILITIES	<p>The Sales Owner is responsible for gathering and sharing customer intelligence that supports the development of a strong unique proposition that positions our organisation to win.</p> <p>The Solution Owner is responsible for identifying and gaining support from SMEs to develop a strong solution that is cost effective, delivers the customer requirements and provides support to the messaging within the Proposition.</p> <p>The Bid Manager is responsible for facilitating workshops and ensuring the reviewing of the Proposition and Solution, so that they are fit for purpose.</p>
ACCOUNTABILITIES	<p>The Sales Owner is accountable for the proposition, ensuring that we have a compelling case to select our organisation.</p> <p>The Solution Owner is accountable for the solution, ensuring that all elements are developed using SME knowledge to deliver a solution that meets the needs of the customer and supports the proposition.</p> <p>The Bid Manager is accountable to ensure the Bid operates effectively to Best Practice and delivers all deliverables to time and the quality required. They define the Best Practices that will be used for each specific bid.</p>
CONSULTED	SMEs are consulted to bring their acumen to the development of the Solution and Proposition.
INFORMED	Sales and Solution Leadership are informed on the progress in development of the Proposition and Solution. They are the point of escalation for any challenges that cannot be resolved within the Bid Team.

2. The Roles within a Bid Team

There are specific roles within each bid team. Each of these roles has prescribed Accountabilities and Responsibilities for activities that combine to create the compelling proposal that the customer selects for award. Each bid needs nominated names for each of these roles.

There are other members of our organisation who will provide support and direction, but do not form part of the core bid team. This includes SMEs, Finance and Commercial.

Each member of the bid team has a bid role title, and some members may have more than one.

BID ROLE	DESCRIPTION
SALES OWNER	The person who owns the opportunity for our organisation. They have identified the opportunity and have qualified it through the Bid No Bid Process. They are accountable for the proposition.
SOLUTION OWNER	The person who is accountable for the development of the solution (service, project or technical). They are usually the SME for the core requirement.
BID MANAGER	The person who will lead the bid team through the Proposal Creation Project by developing a timeline, distributing activities and ensuring the development of the proposal to Best Practice.
PROPOSAL MANAGER	Often this is the Bid Manager or Design Manager. They manage the development of the document, ensuring that it is formatted correctly, and it reads in one voice that it in accordance with the Brand Style Guide and Bid Writing Best Practices.
DESIGN MANAGER	The person who is accountable for the development of the graphical elements of the Proposal. This may include cover art, styling the document or ownership of the document by also holding Proposal Manager accountabilities.
SECTION OWNERS	Members of the team who are accountable for the development of a section (or sub-section) of the proposal. The section or sub-section may contain multiple responses. They are usually an SME for the subject of that section. The Section Owner may be accountable for multiple sections. A Section Owner remains in place until the final freeze of the proposal or under the direction of the Bid Manager.
RESPONSE OWNERS	Members of the team who are accountable for the development of a response within the proposal. The response is usually a question or statement from the customer that needs an answer. A Response Owner may be accountable for multiple responses and may also be a Section Owner.

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BID ROLE	DESCRIPTION
	A Response Owner remains in place until the final freeze of the proposal or under the direction of the Bid Manager.
CONTENT WRITERS	These are SMEs that are called up to support the development of responses. They give advice or input into the response that is further developed by the Section Owner.
REVIEWER	A member of the team or within our organisation who undertakes a formal review of the proposal, sections of the proposal or responses.
RED EVENT REVIEWERS	A selected team who will review our proposal at final draft to provide improvements that increase the clarity and compelling nature of our proposal.

ACCOUNTABILITIES	<p>The Sales Owner is accountable for development of the Executive Summary, fully depicting the Proposition and the identification and support for resolving and responding to the pricing and commercial aspects of the Proposition and the associated responses within the customer requirements documents.</p> <p>The Solution Owner is accountable for identifying and attaining the required support from SMEs to support the ongoing development of the Solution and to respond to the customer requirements documents, which includes costing the solution.</p> <p>The Bid Manager is accountable to ensuring that there is a formed bid team to respond within in the time constraints and with the right quality to the customer requirements.</p> <p>The Bid Manager is accountable for escalating associated issues that cannot be resolved within the Bid Team.</p>
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3. Bid RACI

All bid activities have members of the Bid Team who are accountable, responsible, consulted, and informed. The Bid Roles hold these and it is the same for all bids. This ensures that we are all aware of what we are required to do and own.

3.1. Definition of RACI

Responsible: Activities we must undertake on behalf of the person who is accountable for them. For example, a Content Writer is responsible for providing their acumen into a response for which the Response Owner is accountable for.

Accountable: We are answerable for the correct and thorough completion of the activity and ensuring that we undertake the deliverable to the associated Best Practices, meeting the quality measures and milestones associated with it. For example, the Bid Manager is accountable for the Bid Timetable, not just in its development, but ensuring that the Bid Project meets all the milestones.

Consulted: When we need to provide our acumen into an activity bid or when we need to contribute to a deliverable, without being accountable or responsible. For example, a team member responsible for a deliverable may ask us for our advice that is then used by them in decision making on how they will proceed.

Informed: We all need to understand aspects of the bid, to support us in delivering our accountabilities and responsibilities. For example, we are informed on the milestones that we need to deliver by, and we may be informed on the size of the response we are going to develop.

4. Proposal Creation Stages

Proposals that we create using the Best Practices, develop through inputs and output that create and improve deliverables. This is an effective approach, as it ensures that we undertake all the activities that will deliver a clear, easy to read, compelling proposal. It ensures that we all undertake continuous learning that results in us being more efficient in delivering more effective deliverables.

Within this chapter, we detail the deliverables in a timeline from the start of proposal creation, through to its submission to the customer. For each deliverable, we identify the Best Practice that you must employ, the RACI for its development and the tools that you need to use.

4.1.1. Capture Plan

The Capture Plan is a Shipley Associates approach for capturing and developing the information that will shape our proposal and strengthen the proposition. It identifies factors, such as the customer's business drivers, needs and business case so that we can develop messages that support them in understanding that we will achieve them. We develop the capture plan through our knowledge of the customer case and from deskside research and compute this, through hard thinking, into strong and compelling messages.

RESPONSIBLE	The Bid Manager is responsible for facilitating the Capture Plan workshop, ensuring that it is developed to a suitable standard and ensuring that the messages are transposed, appropriately, into the proposal.
ACCOUNTABLE	The Sales Owner is accountable for bringing the acumen of the customer and customer environment that is the basis of the capture plan. They own the plan and update it with new knowledge.
CONSULTED	The Solution Owner and other SMEs provide their acumen to support the development of the messages within the Capture Plan.
INFORMED	All the Bid Team are provided with the Capture Plan and advised on the messages and content they should use within their responses and sections

FACTOR	DIRECTION
WHEN TO START	<p>Best Practice is that the Sales Owner begins developing the Capture Plan, before the customer formally begins the procurement. This aids qualifications and provides the team with an early background.</p> <p>The Bid Manager will support the further development of the Capture Plan through workshop(s) soon after the customer releases the Requirements documents, and the core team is in place.</p> <p>Often the Bid Manager and Sales Manager will continue to work together to develop and refine the messaging.</p>
INPUT	<ul style="list-style-type: none"> Acumen from the Sales Owner, often supported by SMEs who work with the customer Deskside research to understand the competition and the customer
OUTPUT	<ul style="list-style-type: none"> Key Messages Value Proposition

FACTOR	DIRECTION
	<ul style="list-style-type: none">• Discriminators• Proof Points• Case material
TOOLS AND TEMPLATES	<ul style="list-style-type: none">• Capture Plan Workshop Template (that may be used instead of the document template)

4.1.2. Requirements Documents

The customer will supply document(s) that detail their requirements. This may be supported by other documents, including ones detailing their business case and vision, their organisation and values, the background to the requirements, specifications, draft contract schedules, commercial requirements, and financial requirements.

This provides us with our background knowledge to the procurement and the ask set upon us to respond.

RESPONSIBLE	All the Bid Team are responsible for reading the document set and using the knowledge to support their accountabilities and responsibilities.
ACCOUNTABLE	The Bid Manager is accountable for publishing and sharing the documents and storing them on the developed Team library (when available).
CONSULTED	All the Bid Team are required to identify items that require clarification
INFORMED	All the Bid Team and Sales Leadership are informed of the document being available.

FACTOR	DIRECTION
WHEN TO START	<p>The documents are often delivered via a portal or by an email to the Sales Owner.</p> <p>There may be delays in the delivery of the documents, in which case the Sales Owner should contact the customer to identify the expected date of delivery.</p> <p>The documents should be read within 24 hours of delivery by the Sales Owner, Bid Manager and Solution Owner (at a minimum).</p>
INPUT	<ul style="list-style-type: none"> Requirements Documents from the customer
OUTPUT	<ul style="list-style-type: none"> Informed understanding of the requirements and environment Acumen to undertake an informed Bid No Bid Qualification Acumen to develop the Bid Timeline Acumen to identify resource requirements to respond Acumen to develop the Capture Plan Early understanding of clarifications we need to ask the customer
TOOLS AND TEMPLATES	<ul style="list-style-type: none"> None

4.1.3. Bid / No Bid Qualification

The Bid / No Bid is the formal qualification of the opportunity and whether we should pursue it or not. Effectively it is our organisation deciding whether to invest in entering the competition.

RESPONSIBLE	The Bid Manager is responsible for setting up the Bid No Bid review and facilitating the event, ensuring that the Opportunity Qualification tool is used and the result is recorded.
ACCOUNTABLE	The Sales Owner is accountable for ensuring that the Bid No Bid takes place before the wider investment of resource time is deployed to the opportunity.
CONSULTED	Service Leads, Sales Leadership and SMEs attend the review (as appropriate) and consulted as to whether we should qualify in or out.
INFORMED	The Bid Team and the wider Sales Community are informed of the Bid either through them being allocated to it or within the weekly Sales Meetings.

FACTOR	DIRECTION
WHEN TO START	Generally, within 72 hours of the release of the customer documents, ensuring that everyone has had time to read them, without consuming too much of the time to respond.
INPUT	<ul style="list-style-type: none"> • Requirements Documents from the customer • Formal Bid No Bid meeting
OUTPUT	<ul style="list-style-type: none"> • Qualification
TOOLS AND TEMPLATES	<ul style="list-style-type: none"> • Formal Bid No Bid Qualification Tab, within the correct bid tools

4.1.4. Bid Environment

When the bid has been qualified, we build the right environment for the bid team. This includes the Teams Channel, but may also include the allocation of office space, should the Bid Team or members of the bid team be working at the same location.

RESPONSIBLE	<p>The Bid Manager is responsible for creating the Teams channel to the formal structure, providing access to Bid Team Members and developing the associated correct bid tools.</p> <p>The Bid Manager is further responsible for lodging all documents created to date within the folder structure.</p>
ACCOUNTABLE	The Bid Manager is accountable for providing the team with an effective environment for conducting proposal creation.
CONSULTED	All the Bid Team are consulted as to whether the allocation of physical office space would benefit the Proposal Creation Project.
INFORMED	All the Bid Team are informed of the Teams Channel and the location of key documents (customer documents, correct bid tools, Capture Plan)

FACTOR	DIRECTION
WHEN TO START	This should be completed on the day of qualification
INPUT	<ul style="list-style-type: none"> Formal Qualification
OUTPUT	<ul style="list-style-type: none"> Teams Channel Folders furnished with existing documentation
TOOLS AND TEMPLATES	<ul style="list-style-type: none"> None

4.1.5. Timetable

The Timetable formally maps out the Proposal Creation Project, showing dates for all the milestones. The milestones are the activities and deliverables defined within this document.

The creation of the timeline is a compromise between the time we would like to undertake each activity and the time available until proposal submission.

Activities and Milestones (as defined within this document) must be undertaken for all bids and depicted within the Timetable.

It is good practice to present the Bid Team with the Timetable in an appropriate workshop (Kick Off).

The Bid Manager updates the Timetable throughout the bid, using their acumen and experience to manage slippages and changes.

RESPONSIBLE	<p>The Bid Manager is responsible for creating the Timetable, using their acumen and experience on the time required.</p> <p>As appropriate, the Bid Manager may decide on the depth of each activity and the Best Practice Approach undertaken, relative to the value of the opportunity and the time available.</p> <p>The Bid Manager is responsible for updating the Writing Plan, within the correct bid tools, with the relevant review dates.</p> <p>All the Bid Team are responsible for meeting the required milestone and action dates.</p> <p>The Bid Manager is accountable for managing slippages and changes within the Timetable to ensure that we produce a high-quality proposal response by the deadline.</p> <p>The Bid Manager escalates, as needed.</p>
ACCOUNTABLE	<p>The Bid Manager is accountable for developing an achievable Timetable that incorporates all Best Practice activities.</p>
CONSULTED	<p>The Sales Owner and Solutions Owner are consulted on whether their accountabilities and responsibilities within the bid are achievable within the timelines.</p> <p>All the Bid Team are consulted on their progress to achieve milestones and activities and are expected to resolve any slippage that they are encountering (for example providing a suitable response to a review milestone date).</p> <p>This consultation may result in the identification of additional resource requirements.</p>
INFORMED	<p>All the Bid Team are presented with the timeline and taken through the milestones to complete the Proposal Creation Project.</p> <p>All the Bid Team are updated with any changes or challenges to the timeline and any remedial activities to fix slippages.</p>

FACTOR	DIRECTION
WHEN TO START	This should be completed within 24 hours of qualification
INPUT	<ul style="list-style-type: none">• Formal Qualification• Customer Timetable• Customer submission requirements
OUTPUT	<ul style="list-style-type: none">• Timeline and milestones for all activities• Updated Writing Plan with review dates for all responses and sections
TOOLS AND TEMPLATES	<ul style="list-style-type: none">• Timetable template within the correct bid tools

4.1.6. Kick Off

The Kick Off is the formal start to the Proposal Creation Project and may be a virtual or face to face event, depending on deal value and locations.

The content of a Kick Off and thus the agenda may differ, but this is a great opportunity for the development of Best Practice activities, such as the Capture Plan and allocation of ownership to content.

At a minimum, the kick off should include:

-  Overview of the customer and the requirement (Sales Owner)
-  Proposal Timeline (Bid Manager)
-  Response Structure and Format (Bid Manager)

RESPONSIBLE	<p>The Sales Owner is responsible for presenting the background to the opportunity, their understanding of the requirement and why we should be positioned to win.</p> <p>The Bid Manager is responsible for presenting the timeline, the structure of the response and format as computed from the customer documentation.</p>
ACCOUNTABLE	The Bid Manager is accountable for all the team having a common and suitable understanding of the bid and the Proposal Creation Project so that they can effectively undertake their accountabilities and responsibilities.
CONSULTED	The Solution Owner may be consulted to present their overview of the solution.
INFORMED	All the Bid Team are invited to the kick-off event and informed via the content.

FACTOR	DIRECTION
WHEN TO START	Soon after qualifications, ideally within 72 hours. This is dependent on Bid Team Member availability, but the workshop should go ahead providing a quorum is available.
INPUT	<ul style="list-style-type: none"> • Capture Plan • Timetable • Response skeleton
OUTPUT	<ul style="list-style-type: none"> • All the bid team aware of the attributes of the opportunity and motivated to support winning the deal.
TOOLS AND TEMPLATES	<ul style="list-style-type: none"> • Capture Plan • Timetable • Contents Toolkit (skeleton of the response)

4.1.7. Allocation of responses and sections to owners

The proposal documents that we will submit to the customer consist of a number of components (responses) that combine into sections or sub-sections. As described earlier in this document, all responses will have a Response Owner and a group of responses form a section or sub-section that have a Section Owner.

Through a workshop, we make the allocation of these accountabilities. The workshop must include the Bid Manager, Sales Owner and Solutions Owner, at a minimum.

This allocation is developed within our organisation Contents Toolkit, so that the size of each response and the messages that should be depicted within that response are also included.

RESPONSIBLE	The Bid Manager, Sales Owner and Solution Owner are responsible for allocating ownership of the responses and sections to members of the Bid Team. They are further responsible for ensuring that all members of the team receive accountabilities that they can achieve within the time they have available. The Bid Manager is further responsible for building the Writing Plan, within the correct bid tools using the information within the Content Toolkit.
ACCOUNTABLE	The Bid Manager is accountable for ensuring that members of the bid team own all responses and sections.
CONSULTED	The Bid Team are consulted on whether they accept the accountabilities that are identified for Section and Response ownership
INFORMED	All the Bid Team are presented with their ownership via publication of the completed Contents Toolkit.

FACTOR	DIRECTION
WHEN TO START	Either as part of the Kickoff event or (ideal) to present within the Kickoff
INPUT	<ul style="list-style-type: none"> • Skeleton of response structure within the Contents Toolkit • Understanding of the Bid Team and their availability
OUTPUT	<ul style="list-style-type: none"> • Ownership for all responses within the document with (as appropriate) response size targets and allocation of messages to embed • Writing Plan within the correct bid tools
TOOLS AND TEMPLATES	<ul style="list-style-type: none"> • Writing Plan within the correct bid tools • Contents Plan working as the Story Board

4.1.8. The Writing Plan

The Writing Plan is contained within the correct bid tools. It is a list of all the sections and responses that we need to develop to create the complete proposal response for the customer. Each section or response has the owners name (Section Owner or Response Owner), support they may need to complete the response (Content Writer) and the names of the reviewers (explained later in this document). It also holds the milestone dates for each of the review and the status of the response (whether it is in progress, ready for draft review etc.).

The Writing Plan is effectively a more detailed version of writing element within the Timetable.

RESPONSIBLE	The Section Owners and Response Owners are responsible for ensuring that all their response activities within the Writing Plan are current. They are required to update the status and draft reviewer names as they develop the responses.
ACCOUNTABLE	The Bid Manager is accountable for developing the Writing Plan and ensuring that it remains current and able to meet the milestones within the Timetable.
CONSULTED	The Section Owners are consulted when the Bid Manager requires clarity on ownership of responses.
INFORMED	All Bid Team members are presented with the Writing Plan and are shown status through personal review or at the proposal stand-up reviews.

FACTOR	DIRECTION
WHEN TO START	On completion of the contents plan and updated once the allocation of responses is complete.
INPUT	<ul style="list-style-type: none"> • Skeleton of response structure within the Contents Toolkit • Allocation of responses is developed within the Content Toolkit • Timetable within the correct bid tools
OUTPUT	<ul style="list-style-type: none"> • Writing Plan, available for use and updating within Proposal Stand-Up reviews
TOOLS AND TEMPLATES	<ul style="list-style-type: none"> • Writing Plan within the correct bid tools

4.1.9. Proposal Templates

The Proposal Templates define the format of the document(s) that we will deliver to the customer. We determine the format of the templates through four factors:

-  **Customer compliancy requirements:** The customer may detail the format for each response. This may include whether we must return documents within their templates, uploaded as individual responses onto a portal and whether it is in Word or PowerPoint or Excel format. They may also detail the size (page or word count), the language (English – UK or English America, for example) and whether we can use graphics or not. Failure to follow the customer requirements can result in disqualification
-  **our organisation Brand Guidelines:** We must apply our organisation style guide rules to all documents that we provide to customers. This is to ensure that we deliver consistent, high-quality representations of our organisation
-  **Shipley Associates Guidelines:** Shipley Associates give guidance on how to structure documents to increase the readability of them by people evaluating proposals. The use of this guidance increases the understanding of our responses and thus the evaluation scores.
-  **Customer Specifics:** The Sales Owner may have an understanding on the reading styles within the customer. For example, whether their documents are highly graphical, they want full explanations for responses etc. The Sales Owner may also know that they expect to receive low quality responses (quotations) from other suppliers and a high-quality response from us may be well received. By incorporating this into our templates, we appeal to their reading style that can lift the perception of our responses.

RESPONSIBLE	<p>The Sales Owner is responsible for providing insight into what will appeal to the customer.</p> <p>The Proposal Manager is responsible for developing the templates, incorporating the customer headings and questions and the output from the Contents Toolkit, under guidance from the Bid Manager.</p> <p>The Proposal Manager is further responsible for building the templates into the Team Channel Structure (under working documents)</p>
ACCOUNTABLE	The Bid Manager is accountable for ensuring that templates are in accordance with the four bullet points (above).
CONSULTED	<p>The Sales Owner is consulted for the customer factors relating to the Proposal Template.</p> <p>The Design Manager may be consulted at this time for support on the graphical design of the template, or this may be undertaken within the further design activities.</p>
INFORMED	<p>All the Bid Team are presented with the templates and instructed to use them for their responses.</p> <p>They are presented with the location and structure of the templates, within the Teams Channel.</p>

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FACTOR	DIRECTION
WHEN TO START	Within 24 hours of the Bid Environment being built and updated, as required
INPUT	<ul style="list-style-type: none">• Customer Documentation• Consultation with Sales Owner• Contents Toolkit
OUTPUT	<ul style="list-style-type: none">• Proposal response template(s)
TOOLS AND TEMPLATES	<ul style="list-style-type: none">• Standard Proposal Templates• Customer supplied templates

4.1.10. Design Of Proposal Response

The proposal should carry a design, in the form of cover art and in cases the stylisation of the page templates. This can range from a fully designed proposal, using InDesign, through to cover and section art within a Word or PowerPoint document to no graphical representation, where it is not permitted by the compliancy requirements of the customer.

Where a proposal is being created within InDesign, the Design Manager also performs the Accountabilities and Responsibilities of the Proposal Manager. In the instance of some proposals, generally low value, the cover art may be selected from available artwork within our organisation's Photo Library. In this instance, the Proposal Manager also performs the Accountabilities and Responsibilities of the Design Manager. The design should represent a combination of our organisation's brand, the customer's brand and the key messages and vision for the procurement.

RESPONSIBLE	<p>The Sales Owner is responsible for providing insight into what will appeal to the customer.</p> <p>The Design Manager is responsible for creating designs for the cover art and proposal, as required for this bid.</p> <p>The Design Manager is responsible for creating associated imagery, such as page backgrounds, where required, and for ensuring that we have permission to use any customer's owned artwork and that we have the right to use third party artwork.</p> <p>The Proposal Manager is responsible for implementing the selected cover art and imagery into the Proposal Templates, as appropriate.</p>
ACCOUNTABLE	<p>The Design Manager is accountable for gaining agreement and producing the required art and imagery and is also accountable for ensuring the art and imagery is sized for digital documents, except where physical documents are given to the customer.</p>
CONSULTED	<p>The Bid Manager is consulted on constraints from the customer, such as usage of graphics within our response.</p> <p>The Sales Owner is consulted on rights to use customer owned artwork.</p>
INFORMED	<p>All the Bid Team are presented with the selected design through their use of the Proposal Templates.</p>

FACTOR	DIRECTION
WHEN TO START	After development of the capture plan (for vision and messaging) and development of the allocation of responses (to ensure all customer compliance requirements are met).
INPUT	<ul style="list-style-type: none"> • Capture Plan • Associate Customer Compliancy Constraints
OUTPUT	<ul style="list-style-type: none"> • Proposal response template(s) or artwork for Proposal response templates
TOOLS AND TEMPLATES	<ul style="list-style-type: none"> • Design specific

4.1.11. Proposal Stand-ups

The stand-ups are the method for charting the progress of the Proposal Creation Project against the plan. They often occur daily and last for 15-30 minutes, this is determined by the complexity of the response and the size of the team.

The Bid Manager, Sales Owner, Solutions Owner, all Section Owners and Response Owners are expected to attend. Other members of the bid team and stakeholders are optional attendees.

At each stand-up, the Sales Owner will present any new knowledge gained from the customer. The Bid Manager will present any changes to the Timetable or bid team. The Bid Manager will then lead the team through the Writing Plan, ensuring that the status is correct. The Bid Manager captures any slippages and creates actions that are captured within the action plan, within the correct bid tools.

The action plan is then reviewed, updated, and any issues are escalated, as required.

The result of the stand-up reviews is that the Proposal Creation Project remains on track, and issues are resolved early ensuring that we produce the high-quality proposal we want.

RESPONSIBLE	<p>The Bid Manager is responsible for diarising the stand-ups and ensuring a suitable method of communication.</p> <p>The Sales Owner is responsible for ensuring that the Bid Team is current with any new knowledge or changes from the customer.</p> <p>The Bid Manager is responsible for leading the team through the Writing Plan, ensuring that it is current and that any issues are identified and resolved, actioned or escalated.</p> <p>The Section Owners and Response Owners are responsible for ensuring that they actively participate within the Stand-Up and undertake activities to ensure that their responses and actions are completed to deadlines.</p>
ACCOUNTABLE	The Bid Manager is accountable for deciding and enacting the Stand-Up meeting reviews.
CONSULTED	All the Bid Team are consulted for progress to meet their responsibilities for responses and actions and for the provision of advice and support to achieving milestones
INFORMED	<p>All the Bid Team are informed about progress and actions through these events.</p> <p>All the Bid Team receive calendar entries for the Stand-up reviews</p>

FACTOR	DIRECTION
WHEN TO START	After allocation of responses and the inclusion of ownership into the Writing Plan.
INPUT	<ul style="list-style-type: none">• Writing Plan within the correct bid tools• Actions Plan within the correct bid tools
OUTPUT	<ul style="list-style-type: none">• Daily progress reviews• Current Progress dashboard through the Writing Plan
TOOLS AND TEMPLATES	<ul style="list-style-type: none">• Writing Plan within the correct bid tools• Timetable within the correct bid tools

4.1.12. Writing – First Draft

The first draft of responses may be fully formed, partially formed or a series of bullet points indicating the content that the Response Owner identifies is required to provide a high evaluation scoring, compliant response. This provides us with a better understanding of which responses require additional support to create, which could be additional SME support, Content Writer support or the requirement for a workshop to identify how we wish to respond.

RESPONSIBLE	<p>The Response Owner is responsible for developing their understanding of what the customer is asking for and building a draft response that covers all aspects of that requirement.</p> <p>The Section Owner is responsible for supporting the Response Owner in the development of the first draft response through discussions on their progress and being available for questions and escalations.</p> <p>The Response Owner is responsible for writing the response into the associated Proposal Template,</p> <p>The Response Owner is responsible for identifying and developing graphics required for the response and informing the Design Manager of the requirement, providing their draft graphic.</p>
ACCOUNTABLE	The Response Owner is accountable for developing all their first draft responses to the required standard for the first draft review.
CONSULTED	<p>Content Writers and SMEs are consulted to support the development of the first draft.</p> <p>The Section Owner is consulted for support, as required.</p>
INFORMED	<p>The Section Owner is informed of any issues that the Response Owner is having.</p> <p>All the Bid Team are informed of progress, through the Stand-Up review.</p>

FACTOR	DIRECTION
WHEN TO START	After allocation of responses and the inclusion of ownership into the Writing Plan.
INPUT	<ul style="list-style-type: none"> • Writing Plan within the correct bid tools • Proposal Response Template • Customer Documentation
OUTPUT	<ul style="list-style-type: none"> • First Draft of Responses within the Proposal Template
TOOLS AND TEMPLATES	<ul style="list-style-type: none"> • Best Practice Guide for writing High Quality Proposals • The Writers Guide • Sales Methodology • Proposal Template

4.1.13. First Draft Review

The first draft review is to ensure that all responses are being developed in accordance with the Timetable and Writing Plan. It is our opportunity to identify and resolve issues and challenges in developing some of the responses.

The Reviewer is generally the Section Owner unless they are also the Response Owner. Where this is the case, the Section Owner must find a suitable SME to act as the Reviewer.

RESPONSIBLE	<p>The Response Owner is responsible for providing the responses in time for the first draft review.</p> <p>The Reviewer is responsible for reviewing the response ensuring that it is comprehensive (answers all elements of the customer requirement, statement or question), is correct (represents our organisation and our capabilities) and contains evidence and case material, as appropriate.</p> <p>The Reviewer gives direction on how the response needs to change for it to reach the highest evaluation score. This can be in the form of direct feedback or comments within the document.</p>
ACCOUNTABLE	The Bid Manager is accountable for ensuring that the first Draft Review happens on time with the quality of output required. Where the quality of review is not achieved, the Bid Manager may build a second review into the Timetable.
CONSULTED	The Response Owner is consulted with feedback from the reviewer.
INFORMED	<p>The Reviewer informs the Bid Manager of any issues in undertaking the review.</p> <p>All the Bid Team are informed of the performance of the review through the updates in the Writing Plan and within the following Stand-Up Review.</p>

FACTOR	DIRECTION
WHEN TO START	As planned within the Writing Plan and Timetable.
INPUT	<ul style="list-style-type: none"> • Proposal Template • Customer Documentation
OUTPUT	<ul style="list-style-type: none"> • Formal advice for each response, either directly to the Response Owner or as comments within the proposal
TOOLS AND TEMPLATES	<ul style="list-style-type: none"> • Best Practice Guide for writing High Quality Proposals • The Writers Guide

4.1.14. Writing – Second Draft

The response is developed following the advice and direction from the first draft review to become complete answers that follow the Sales method, as appropriate. The associated graphics are designed and included within the responses.

The section flows and is written in one voice that is in accordance with the advice from the Best Practice for writing high quality proposals and is grammatically correct, through use of the Writers Guide. Responses and sections are formatted correctly through the use of styles and correct use of pagination.

RESPONSIBLE	<p>The Response Owner is responsible for developing their responses following the advice from the Reviewer and using the support of the Content Writers and SMEs.</p> <p>The Response Owner is responsible for ensuring the quality of their responses through use of the Writers Guide and the Best Practice for High Quality Proposals and the Sales Method. They are further responsible for ensuring the correct formatting by using styles and pagination techniques.</p> <p>The Section Owner is responsible for ensuring the flow of the section and that each response is comprehensive and correct.</p> <p>The Section Owner is responsible for ensuring the quality of their sections through use of the Writers Guide and the Best Practice for High Quality Proposals and the Sales Method. They are further responsible for ensuring the correct formatting by using styles and pagination techniques.</p> <p>The Response Owners and Section Owners are responsible for identifying additional graphical elements and informing the Design Manager.</p> <p>The Design Manager is responsible for providing the required graphics for the responses.</p> <p>The Proposal Manager is responsible for ensuring the formatting of the Proposal Templates is correct and that the guidance of the Writers Guide is employed throughout.</p> <p>The Proposal Manager is responsible for identifying graphics that have not been through the design process and unsuitable screenshots (such as reports and dashboards) and forwarding them to the Design Manger for improvement.</p>
ACCOUNTABLE	<p>The Section Owners are accountable for ensuring that their sections are complete, comprehensive and capable of receiving high scoring evaluations by the customer.</p>
CONSULTED	<p>Content Writers and SMEs are consulted to support the development of the first draft.</p> <p>All the Bid Team and the wider our organisation Community are consulted for support, as required.</p> <p>The Bid Manager is consulted over any issue or challenge that could impact the Timetable and Writing Plan.</p>
INFORMED	<p>The Section Owner is informed of any issues that the Response Owner is having.</p>

The **Bid Manager** and **Sales Owner** are informed of issues, at latest, through the following Stand-Up Review.

All the **Bid Team** are informed of progress through the Stand-Up Review.

FACTOR	DIRECTION
WHEN TO START	Immediately following the completion of the first Draft Review
INPUT	<ul style="list-style-type: none"> • Writing Plan within the correct bid tools • Proposal Response Template complete with first draft responses • Formal Feedback from the first Draft Review • Customer Documentation
OUTPUT	<ul style="list-style-type: none"> • second Draft of Responses within the Proposal Template
TOOLS AND TEMPLATES	<ul style="list-style-type: none"> • Best Practice Guide for writing High Quality Proposals • The Writers Guide • Sales Methodology • Proposal Template

4.1.15. Second Draft Review

The second draft review is our first opportunity to review our proposal in its entirety. Each section and response should be comprehensive and complete, written in the right style and formatted correctly. There may be exceptions, where it has not been possible to fully respond, but these should be known, and the Bid Manager informed so that they can make plans for additional reviewing.

We need to review the document as sections and for each response. This is also an opportunity to review the clarity of the writing to ensure that it is easy for the customer to read.

We, therefore, perform three separate strands to this review:

-  **Response Review:** To ensure that all responses are comprehensive, complete and able to achieve high evaluation scores
-  **Section Review:** To ensure that the section flows, uses one voice and as a secondary review of the responses
-  **Editorial Review:** To ensure that the formatting and clarity is correct

4.1.16. Response Review

The Reviewer is generally an SME who did not perform the first draft review. This may be another member of the Bid Team or an SME outside of the team. Where an SME for outside the team is asked to review, they are required to read the customer documentation to inform them of the environment and business case for the procurement.

The purpose is to review the response(s) using their acumen of the subject and our organisation's capabilities and past performance. They should identify elements that can improve the response, so that it will score higher in the customer evaluation. In some instances, they may find significant issues with the response and need to provide direction in how to rewrite it or escalate, as appropriate.

RESPONSIBLE	<p>The Response Owner is responsible for providing the responses in time for the second draft review.</p> <p>The Reviewer is responsible for reviewing the response ensuring that it is comprehensive (answers all elements of the customer requirement, statement or question), is correct (represents our organisation and our capabilities) and contains evidence and case material, as appropriate.</p> <p>The Reviewer gives direction on how the response needs to change for it to reach the highest evaluation score. This can be in the form of direct feedback or comments within the document.</p>
ACCOUNTABLE	The Bid Manager is accountable for ensuring that the second Draft Review happens on time with the quality of output required. Where the quality of review is not achieved, the Bid Manager may build a second review into the Timetable.
CONSULTED	The Response Owner is consulted with feedback from the reviewer.
INFORMED	<p>The Reviewer informs the Bid Manager of any issues in undertaking the review.</p> <p>All the Bid Team are informed on the performance of the review through the updates in the Writing Plan and within the following Stand-Up Review.</p>

FACTOR	DIRECTION
WHEN TO START	As planned within the Writing Plan and Timetable.
INPUT	<ul style="list-style-type: none"> • Proposal Template • Customer Documentation
OUTPUT	<ul style="list-style-type: none"> • Formal advice for each response, either directly to the Response Owner or as comments within the proposal
TOOLS AND TEMPLATES	<ul style="list-style-type: none"> • Best Practice Guide for writing High Quality Proposals • The Writers Guide • Sales Methodology

4.1.17. Section Review

The Reviewers are the Sales Owner, the Bid Manager and the Solution Owner. They use the RED Event approach to review the sections and identify elements that must or should be improved. They also provide observations on ways to increase the compelling nature of the section and may identify sentences or paragraphs that are difficult to understand.

They are reading the sections, effectively with the customer's eyes, using their acumen in bidding and our organisation to identify the improvements. This may identify significant issues with a section or response that can be resolved by taking agreed action.

Following this review, the issues and suggestions are collated and provided to the Section Owner to implement. The Section Owner may delegate some of these to the Response Owners, as appropriate.

RESPONSIBLE	<p>The Section Owner is responsible for providing the responses in time for the second draft review.</p> <p>The Reviewers are responsible for reviewing sections of the proposal, using the approach and templates within the Best Practice for RED Events.</p> <p>The Reviewers identify issues and provide suggestions within the RED Event Feedback Form.</p> <p>The Reviewers discuss their finding and agree actions that are required to improve the quality of sections. This is included in the collated RED Event forms.</p> <p>The Bid Manager is responsible for collating the feedback and providing to the Sections Owners as actions.</p>
ACCOUNTABLE	<p>The Bid Manager is accountable for ensuring that the second Draft Review happens on time with the quality of output required. Where the quality of review is not achieved, the Bid Manager may build a second review into the Timetable.</p>
CONSULTED	<p>The Section Owner is consulted with the feedback collected in RED Event forms to agree actions to improve.</p>
INFORMED	<p>The Section Owners are informed of the issues and suggestions and specific actions to improve the quality of the sections. The Section Owner may delegate some of these to the Response Owners, as appropriate.</p> <p>All the Bid Team are informed on the performance of the review through the updates in the Writing Plan and within the following Stand-Up Review.</p>

FACTOR	DIRECTION
WHEN TO START	As planned within the Writing Plan and Timetable.
INPUT	<ul style="list-style-type: none">• Proposal Template• RED Event Form• Customer Documentation
OUTPUT	<ul style="list-style-type: none">• Collated RED Event Forms
TOOLS AND TEMPLATES	<ul style="list-style-type: none">• Best Practice Guide for RED Events• Best Practice Guide for Writing High Quality Proposals• The Writers Guide• Sales Methodology

4.1.18. Writing – Final Draft

The response is developed following the advice and direction from the second draft review. This includes:

- 🌀 The improvements to the responses, as directed by the response review and those delegated by the Section Owner from the Section Review
- 🌀 The improvements to the sections as directed by the RED review suggestions and actions from the Section Review
- 🌀 Improved Graphics resulting from all the reviews

The target is to have a document that we would be happy to present to the customer. Through the reviewing process, the key members of the Bid Team have identified and made the improvements to lift the quality of the document and ensure that we have responded completely, within the right writing style.

RESPONSIBLE

The **Response Owner** is responsible for developing their responses following the advice from the Response Review and any actions delegated from the section review. They may still require the support of the Content Writers and SMEs.

The **Response Owner** remains responsible for ensuring the quality of their responses through use of the Writers Guide and the Best Practice for High Quality Proposals and the Sales Method. They are further responsible for ensuring the correct formatting by using styles and pagination techniques.

The **Section Owner** is responsible for developing the section by implementing the improvements and actions from the Section Review. They may require the support of SMEs to achieve this. They are responsible for attain this support, or escalation to the Bid Manager.

The **Section Owner** remains responsible for ensuring the quality of their sections through use of the Writers Guide and the Best Practice for High Quality Proposals and the Sales Method. They are further responsible for ensuring the correct formatting by using styles and pagination techniques.

Should there be any final improvements or need for new graphics, the **Response Owners** and **Section Owners** are responsible for informing the Design Manager.

The **Design Manager** is responsible for providing the required graphics for the responses.

The **Design Manager** is responsible for reviewing the entire proposal and ensuring that there are no graphical elements that require improvement.

The **Proposal Manager** is responsible for ensuring the formatting of the Proposal Templates is correct and that the guidance of the Writers Guide is employed throughout.

The **Proposal Manager** is responsible for identifying graphics that have not been through the design process and unsuitable screenshots (such as reports and dashboards) and forwarding them to the Design Manger for improvement.

Alchemy RACI and workflow for Proposal Development

ACCOUNTABLE	The Section Owners are accountable for ensuring that their sections are complete, comprehensive and capable of receiving high scoring evaluations by the customer.
CONSULTED	<p>Content Writers and SMEs are consulted to support the development of responses.</p> <p>All the Bid Team and the wider our organisation Community are consulted for support, as required.</p> <p>The Bid Manager is consulted over any issue or challenge that could impact on the Timetable and Writing Plan.</p>
INFORMED	<p>The Section Owner is informed of any issues that the Response Owner is having.</p> <p>The Bid Manager and Sales Owner are informed of issues, at latest, through the following Stand-Up Review.</p> <p>All the Bid Team are informed of progress through the Stand-Up Review.</p>

FACTOR	DIRECTION
WHEN TO START	Immediately following the competition of the second Draft Review
INPUT	<ul style="list-style-type: none"> • Writing Plan within the correct bid tools • Proposal Response Template complete with first draft responses • Formal Feedback from the second Draft Reviews • Customer Documentation
OUTPUT	<ul style="list-style-type: none"> • Final Draft of Responses within the Proposal Template
TOOLS AND TEMPLATES	<ul style="list-style-type: none"> • Best Practice Guide for writing High Quality Proposals • The Writers Guide • Sales Methodology • Proposal Template

4.1.19. RED Event

The RED Event is a formal review of the document by a selected team who have not worked on the bid. This follows the Shipley Associates method.

The purpose is to have our proposal documents reviewed by experts who can read the document with the customer's eyes and bring improvements, using their expertise, acumen and experience of our organisation.

This results in a series of improvements that become the action plan for completing our proposal documents. The rationale is that if we make other changes, then this is against the advice of the RED Event reviewers.

RESPONSIBLE	<p>The Bid Manager, Solution Owner and Sales Owner are responsible for selecting the team that would like to RED review the proposal.</p> <p>The Bid Manager is responsible for inviting the RED Events to participate and to manage replacements, should they not be available.</p> <p>The Bid Manager, Solution Owner and Sales Owner are responsible for allocating sections to be reviewed by each RED Eventer, using the RED Event Selection tool.</p> <p>The Bid Manager is responsible for developing the RED Event Summary of the bid and providing it to the RED Eventers to enable them to understand the environment and requirement.</p> <p>The Bid Manager is responsible for communicating with RED Eventers, providing them with Guidance on their role and the RED Event Feedback Forms.</p> <p>The RED Eventers are responsible for reviewing the selected sections and noting their issues and suggestions within the RED Event Feedback forms.</p> <p>The RED Eventers are responsible for providing feedback within the timelines.</p> <p>The Bid Manager is responsible for collecting feedback by section and priority (Must Change, Should Change, Observations, Grammar).</p> <p>The Bid Manager, Solution Owner and Sales Owner are responsible for reviewing the collated feedback and developing the actions list to close the Proposal Creation Project.</p>
ACCOUNTABLE	The Bid Manager is accountable in managing the RED Event in accordance with Best Practice.
CONSULTED	The Sales and Solutions Leadership may be consulted to confirm the actions to close the Proposal Creation Project.
INFORMED	All the Bid Team are informed of the results of the RED Event and the actions to close.

FACTOR	DIRECTION
WHEN TO START	As planned within the Writing Plan and Timetable.
INPUT	<ul style="list-style-type: none">• Proposal Template at Final Draft
OUTPUT	<ul style="list-style-type: none">• Collated RED Event Feedback.
TOOLS AND TEMPLATES	<ul style="list-style-type: none">• RED Event Best Practice• RED Event Selection Tool• RED Event Summary Template• RED Event Feedback Forms

4.1.20. Editorial

Following the RED Event, the team have developed the actions to close the Proposal Creation Project. By completing these actions, we have improved the proposal in accordance with the direction of the RED Reviewers.

We reduce the number of people working on the proposal documents to the Editorial Team. This is to ensure that changes, other than those agreed within the actions are not made to the document.

It is very possible to reduce the quality of the proposal when that are many people making late changes that have not had consideration.

The Editorial Team generally consists of the Bid Manager, the Proposal Manager, The Sales Owner and the Solution Owner. Others in the Bid Team may be presented with actions. When this is the case, the actions should be completed off-line and provided to the Editorial Team for inclusion in the document. This ensures that all changes are reviewed before they are implemented.

On completion of the editorial actions, the proposal is ready for the Final Format and Edit Review.

RESPONSIBLE	<p>The Editorial Team are responsible for allocating and managing the actions to a timeline, ensuring that there is adequate time available for the Final Format and Edit.</p> <p>The Editorial Team are accountable for escalating the requirements for urgent support to complete actions.</p> <p>The Proposal Manager is responsible for performing Final Format and Edit activities, to lessen the pressure once the proposal has completed its Editorial Actions.</p> <p>The Bid Manager is responsible for managing the timetable for the completion of the Editorial Actions.</p> <p>The Editorial Team is responsible for agreeing any additional changes to the document other than those resulting from the RED Event.</p>
ACCOUNTABLE	The Bid Manager is accountable in managing the Editorial Stage, ensuring that the actions are completed with adequate time for the Final Format and Edit activities
CONSULTED	The Sales and Solutions Leadership may be consulted to support the actions to close the Proposal Creation Project.
INFORMED	All the Bid Team are informed on the results of the Editorial Stage and the actions to close.

FACTOR	DIRECTION
WHEN TO START	On completion of the RED Event
INPUT	<ul style="list-style-type: none"> Consolidated RED Event Feedback and Actions List
OUTPUT	<ul style="list-style-type: none"> Proposal Documents frozen for Final Edit and Format activities
TOOLS AND TEMPLATES	<ul style="list-style-type: none"> Final Format and Edit Checklist

4.1.21. Final Format and Edit

The Proposal Documents are now frozen and only the Proposal Manager is permitted to access them.

The undertake a series of checklist actions to ensure that the format is consistent, and the guidance of the Writers Guide is implemented. There are also a series of checks to ensure that we are not using words that may not resonate well with the customer.

On completion of this, the Proposal Documents are reviewed in a rapid manner (Print and Be Damned Review) to ensure that the formatting is correct. It is now too late to make other changes to the document.

RESPONSIBLE	The Proposal Manager is responsible for implementing the Final Format and Edit checklist actions. The Editorial Team are responsible for undertaking the Print and Be Damned Review.
ACCOUNTABLE	The Bid Manager is accountable for the Final Format and Edit stage.
CONSULTED	There is no requirement for consultation
INFORMED	All the Bid Team, Sale and Solution Leadership are informed, as appropriate, on the completion of this Final Format and Edit stage.

FACTOR	DIRECTION
WHEN TO START	On completion of the Editorial Stage
INPUT	<ul style="list-style-type: none"> Proposal Documents with all Editorial Stage actions completed.
OUTPUT	<ul style="list-style-type: none"> Final Proposal Documents after Final Format and Edit checklist actions and after the Print and Be Damned Review.
TOOLS AND TEMPLATES	<ul style="list-style-type: none"> Final Format and Edit Checklist

4.1.22. Deliver to the customer

The Proposal Documents delivered to the customer by the method they have requesting in the requirements documents. This is generally by uploading to a portal or sending by email.

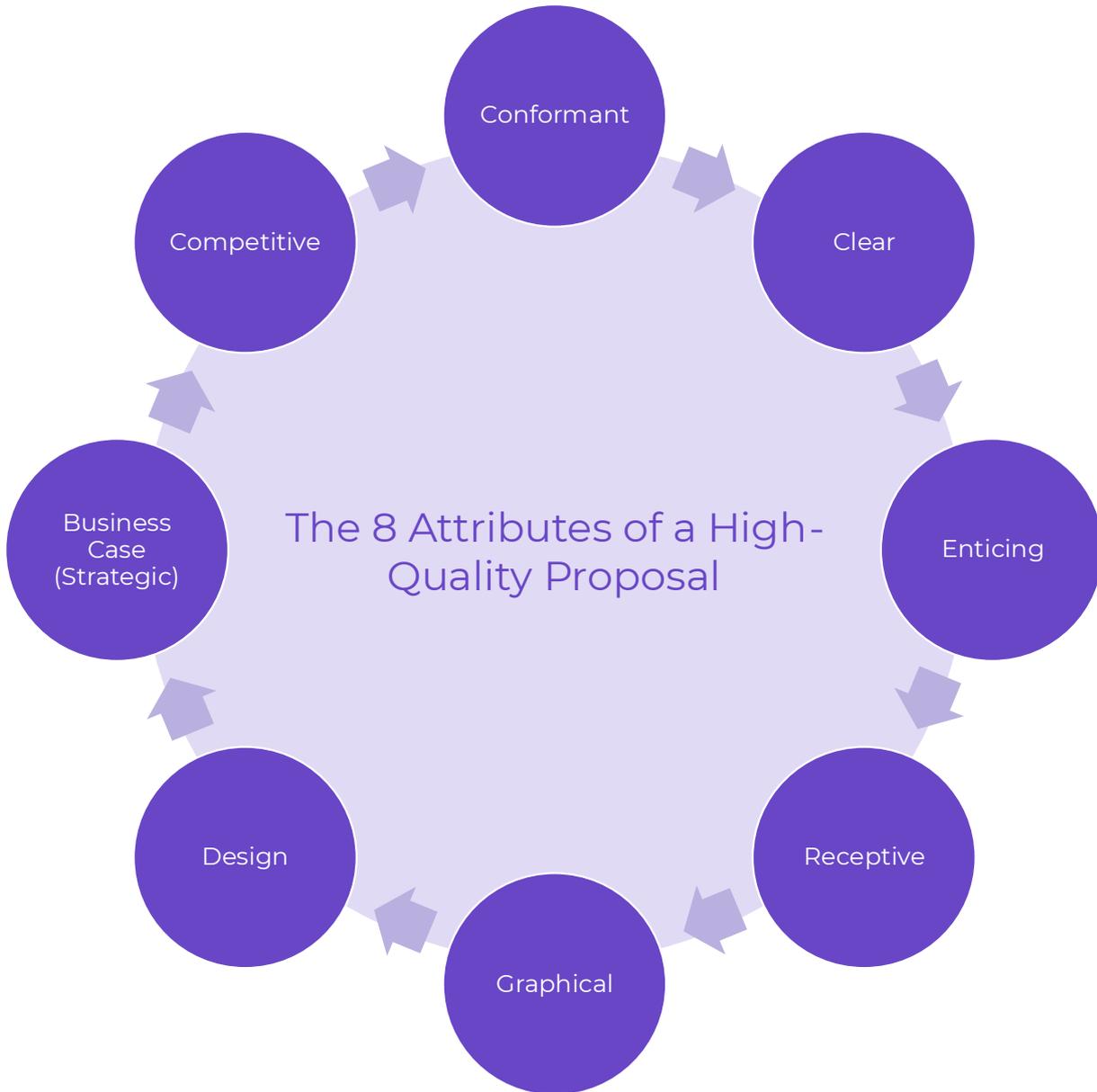
This stage is complete and the Proposal Creation Project closed, when there is confirmation that the Proposal Documents have been received.

RESPONSIBLE	<p>The Bid Manager is responsible for uploading the documents to the correct portal.</p> <p>The Sales Owner is responsible for submitting it by email.</p> <p>The Sales Owner is responsible for any message that they wish to be sent to the customer with the submission.</p> <p>The Bid Manager is responsible for lodging the confirmation of receipt, for audit purposes.</p>
ACCOUNTABLE	The Sales Owner is accountable for the submission of the Proposal Documents, as they have the relationship with the customer.
CONSULTED	There is no requirement for consultation
INFORMED	All the Bid Team, Sale and Solution Leadership are informed, as appropriate, on the completion of this final stage.

FACTOR	DIRECTION
WHEN TO START	On completion of the Final Format and Edit Stage and in accordance with the associated milestone within the Timetable.
INPUT	<ul style="list-style-type: none"> Final Proposal Documents.
OUTPUT	<ul style="list-style-type: none"> Formal Confirmation from the customer that the Proposal Documents have been received.
TOOLS AND TEMPLATES	<ul style="list-style-type: none"> None

5. The 8 Attributes of a High-Quality Proposal

Shipleigh Associates defined the attributes of High-Quality Proposal. In this version, we depict the 8 Attributes. When we develop each of the attributes to a high standard, we create proposals that are clearer and easier to read, attract the readers eye, ensure that that we answer their business case and give the compelling case to select us.



The 8 attributes are comprehensively explained within the Best Practice Guide, How to Write High-Quality Proposals.

It is possible to measure our performance against each of these attributes, for each of our proposals. Evidence has shown that the higher the score we gain, the higher the win rate.

By building high-quality proposals, we gain higher evaluation scores and hence outscore the competition.

However, the reverse is also true; when we fail to do best, with any of the attributes, we lose evaluation scores and risk our opportunity to win.

5.1. Conformant

We must be conformant with all the customer's requirements for conformance. This includes the format, page count / word count, naming conventions, layouts. It may also include instructions for how we deliver our proposal.

To be conformant, we must always fully and clearly answer each of the customer's questions and statements. Sometimes, the customer may include a convention for answering questions, for example, we may be requested with starting responses for mandatory requirements with the word 'Compliant'.

We must also be conformant with legislation, including diversity, discrimination, confidentiality, IPR and Copyright.

RESPONSIBLE	All the Bid Team are responsible for following the Bid Manager's directions for conformance.
ACCOUNTABLE	The Bid Manager is accountable to ensure the proposal is conformant with customer and legislative requirements.

5.2. Clear

We must write our responses in a manner that means that the readers fully understand them on first reading. Shipley Associates define the writing style, for proposals. This may differ from our personal writing style, and we may disagree with some of the conventions. However, it is proven to work for proposals and is based on significant research into the psychology of reading.

For a proposal to be easy to read, we must all apply the same writing style and conventions. This writing style is detailed within the Best Practice Guide, How to Write High-Quality Proposals.

RESPONSIBLE	Section Owners, Response Owners, the Bid Manager, and the Proposal Manager must be able to write clear proposal responses, as defined within the Best Practice Guide, How to Write High-Quality Proposals.
ACCOUNTABLE	The Proposal Manager is accountable for ensuring that the proposal is edited into a clear document.

5.2.1. Enticing

We must ensure that the readers enjoy reading our proposal. It is not often an activity that they volunteer for, and we must remember that along with our proposal, they may also have another 3-12 to read.

When a proposal is not enticing, readers tend to scan the document and miss pertinent points that would award us evaluation points

For our proposals to be:

- Written in a distinctive voice that resonates with them
- From reading they learn, and they will use this learning to critique competitive proposals
- Relevant to them, arousing curiosity and stimulating thought
- Uses everyday words that they understand
- Repeats common themes and messaging throughout the document to re-enforce their strength
- Be credible and believable
- Give commitment and confidence in our proposition and solution

Within our organisation, we use the Sales Method for ensuring our responses are enticing. We must use this for developing all relevant responses.

RESPONSIBLE	Section Owners and Response Owners are responsible for writing to the Sales Method and deploying the guidance within the Best Practice Guide, How to Write High-Quality Proposals. The Bid Manager is responsible for ensuring that the guidance is being followed.
ACCOUNTABLE	The Sales Owner is accountable for ensuring that the proposal is enticing and deploys the Sales Method for all relevant responses.

5.3. Receptive

We need the customer to be receptive to our proposal. This means that, as they read it, they will agree with our rationale and the value we are proposing.

To achieve this, our proposition must clearly show we will deliver their outcomes, and this aligns and supports their vision and critical success factors. Our messaging must clearly depict how we will meet their needs and mitigate any of their concerns. They must be confident that the benefits we propose are realistically achievable.

The Sales Approach and the guidance within the Best Practice Guide, How to Write High-Quality Proposals supports us in writing receptive proposals.

RESPONSIBLE	<p>Section Owners and Response Owners are responsible for writing to the Sales Method and deploying the guidance within the Best Practice Guide, How to Write High-Quality Proposals.</p> <p>The Bid Manager is responsible for ensuring that the guidance is being followed.</p>
ACCOUNTABLE	<p>The Sales Owner is accountable to ensure that the proposal is receptive and deploys the Sales Method for all relevant responses.</p>

5.4. Graphical

We use graphical techniques to enable the reader to better understand the messages we are delivering within our writing. We also use them to highlight strengths and evidence and to increase the readability of the proposal.

Graphical documents are easier to read and increase understanding.

RESPONSIBLE	<p>Section Owners, Response Owners, are responsible for developing graphical content to support their responses.</p> <p>The Proposal Manager is responsible for developing graphical content to highlight strengths and evidence.</p> <p>The Proposal Manager is responsible for ensuring that tables are presented in common high standard, depicting the style.</p> <p>The Proposal Manager is responsible for ensuring that bullet points are made into tables and graphical elements, as appropriate.</p>
ACCOUNTABLE	<p>The Design Manager is accountable for ensuring that all graphical elements of the proposal are produced to a high standard, deploying the same style.</p>

5.5. Design

We want our proposal to present a professional image and to the reader to want to read first. Research shows that the first proposal gets a higher evaluation score. It is a marker against the proposals read afterwards.

Design incorporates the cover and section artwork and the layout of the pages. The pages may also contain background artwork.

RESPONSIBLE	<p>The Sales Owner is responsible for providing insight into what will appeal to the customer.</p> <p>The Proposal Manager is responsible for ensuring that the customer compliance requirements, our organisation Brand Guidelines, Shipley Associates Guidelines, and customer specifics, as defined by the Sales Owner.</p> <p>The Design Manager is responsible for developing and delivering the required cover, section and background artwork, as directed by the Proposal Manager.</p>
ACCOUNTABLE	<p>The Bid Manager is accountable for ensuring that the layout of the proposal is suitable.</p>

5.6. Business Case

Our proposal must meet and ideally better, the business case of the customer. For any procurement, the customer will have undertaken some level of business case development and justification. The procurement is to enable them to improve performance. We must convince the customer that our proposition will achieve their business case to win.

To achieve this, we deploy the Sales method and support our proposition through the Value Proposition (our response to their business case), resolve their hot-buttons and make explicit why the customer should select us.

RESPONSIBLE	<p>The Sales Owner is responsible for providing insight into the customer business case.</p> <p>The Bid Manager is responsible for facilitating workshops and supporting the Sales Owner in developing our response to their business case, defining the resolutions to Hot Buttons, developing messaging to support the case for 'Why Us?'. The Solution Owner and SMEs are responsible for deploying their experience and acumen within the facilitated workshops to develop these elements.</p>
ACCOUNTABLE	<p>The Sales Owner is accountable for the proposition that included these elements.</p>

5.7. Competitive

Our proposal can be good, but that will not win us the deal, if the competitor has a better proposal and proposition.

We need to ensure that the customer, views our proposal as a better match to their requirements than the competition. We achieve it by ensuring that the customer can see deficiencies in the competition through our statements and strengths.

Even when we are bidding against no competition, there is a strong competitor called 'do nothing'. Here the customer may decide to continue working as they are or to achieve their objectives without our support.

RESPONSIBLE	<p>The Sales Owner is responsible for providing insight into the competitive landscape, including 'do nothing'.</p> <p>The Bid Manager is responsible for facilitating workshops and supporting the Sales Owner in developing our messaging (Benefit Messages) and identifying our discriminators.</p> <p>The Solution Owner and SMEs are responsible for deploying their experience and acumen within the facilitated workshops to develop these elements.</p>
ACCOUNTABLE	<p>The Sales Owner is accountable for the proposition that included these elements.</p>

6. Skills and Capabilities within the Bid Team

As a bid team and able to produce the high-quality proposal that will win in an efficient manner. We all need to have skills and capabilities that enable us to undertake our accountabilities and responsibilities effectively.

The skills and capabilities are depicted below:

BID ROLE	HIGH-QUALITY PROPOSAL WRITING	SALES METHODOLOGY	GRAPHIC DESIGN	MS WORD	BID BEST PRACTICES
SALES OWNER	Expert	Expert	Capable	Proficient	Proficient
SOLUTION OWNER	Expert	Proficient	Capable	Proficient	Proficient
BID MANAGER	Expert	Expert	Proficient	Proficient	Expert
PROPOSAL MANAGER	Expert	Proficient	Expert	Expert	Proficient
DESIGN MANAGER	Capable	Capable	Expert	Proficient	Capable
SECTION OWNERS	Expert	Expert	Capable	Proficient	Proficient
RESPONSE OWNERS	Expert	Proficient	Capable	Proficient	Proficient
CONTENT WRITERS	Capable	Capable	Capable	Capable	Capable
REVIEWER	Expert	Expert	Capable	Capable	Proficient
RED EVENT REVIEWERS	Expert	Expert	Capable	Capable	Proficient
Expert	Widely recognised as an authority, able to lead activities ensuring Best Practice.				
Proficient	Have the knowledge and experience to carry out activity confidently and consistently to Best Practice. You will be aware of alternative approaches and can provide guidance, instruction and advice to others.				
Capable	Have the knowledge and experience to carry out the activity confidently and consistently without supervision.				

6.1. Developing Skills and Capabilities

To undertake our bid roles, we all are on a journey of learning. For each of the skills and methods identified above, we have tools to support us.

6.1.1. High Quality Proposal Writing

- 🌀 Read and use the guidance within the Best Practice Guide for Writing High-Quality Proposals
- 🌀 Read and use the advice within the Writers Guide
- 🌀 Ask for support and coaching to improve elements of your writing style. This can include measuring your responses using the Proposal Quality Model, providing feedback on attributes and elements that you need to improve

6.1.2. Sales Method

- 🌀 Read the Sales Methodology and deploy the guidance within your responses
- 🌀 Use the Sales response template to structure your response
- 🌀 Attain relevant learning events

6.1.3. Graphic Design

- 🌀 Identify relevant learning events within the Academy to develop the relevant graphical thinking and ability to use the relevant tools
- 🌀 Ask for coaching and support from Graphical Experts

6.1.4. MS Word

- 🌀 Undertake MS Word eLearning to advanced level, so that you can confidently use styles and pagination techniques to best practice

6.1.5. Bid Best Practices

- 🌀 Read the Best Practice guides and deploy Best Practice
- 🌀 Learn from Experts whilst working on bids
- 🌀 For those aiming to lead bids as a Bid Manager, join the APMP and participate in learning workshops and events

6.2. Behaviours

All members of the Bid Team are expected to work within the following behaviours

-  **Collaborative:** Supporting team members in the delivery of their responsibilities and respecting the leadership of those who hold accountability for the activity
-  **Timeliness:** Meeting deadlines and milestones for all deliverables, attending all meetings and workshop on time. Where you risk not meeting a deadline, escalating early or gaining support to ensure that you do not cause failure in meeting milestones
-  **Consultative:** Providing your expertise to support the development of the solution, proposition and proposal and respecting that others may have expertise that is used instead of yours
-  **Learning:** Embracing the opportunities to learn and improve our skills and knowledge by working with Experts