

Bid Alchemy Best Practice Guide



Bid Alchemy Proposal Quality Toolkit

Enabling your organisation to measure the quality of your proposals, achieving ongoing improvements and sustainable increases in win rates.

By Martin Eckstein

There is a direct link between the quality of your proposal, the evaluation score it is awarded and your ability to win.

The Bid Alchemy Quality Toolkits deploys the Shipley Associates proposal quality thinking to provide a model that enables you to measure the quality of your proposals.

This enables you to identify improvement projects that increase the quality of all your proposals resulting in a sustainable increase in win rates.

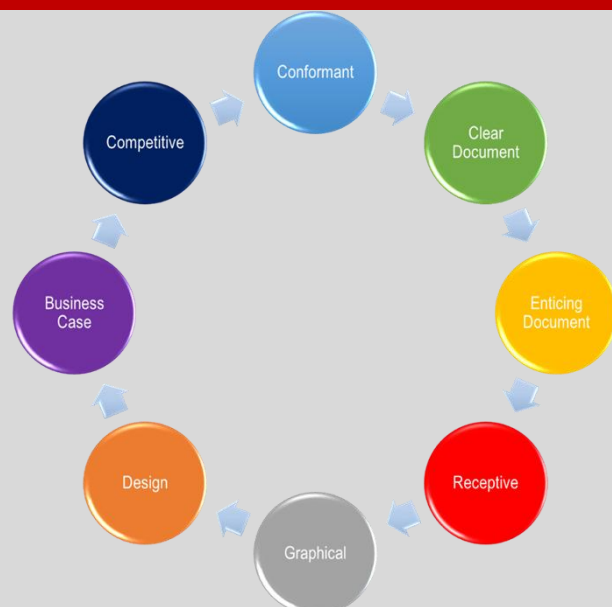


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1. A great proposition does not mean you will win.

Often, when we are in the middle of a bid, we have a head full of problems and a pocket empty of solutions. These problems are generally around getting our proposition to be compelling to the customer, getting the price right, being confident we can manage the risk and working ways to be able to accept the commercial requirements. This is true, it is all part of the game of sales, but these are internal problems. The customer cannot see them, and we do not want them to see these struggles.

What the customer does see is our proposals (and presentations and demonstrations). It is these that they will evaluate and decide who to contract with.

Unfortunately, as we deal with these problems, we park the creation of the proposal. *“If we do not have the right pricing, the proposal does not matter!”* I have heard exclamations like this so many times in my Bid Management journey. It is true, but once you have sorted out the problems, you still need to have a proposal to give to the customer.

So, we end up rushing the proposal and by doing so, we function as if it is a lower priority than the proposition. By doing so, we risk losing deals we should have won.

This is not just a rational argument, it is fact. I have reviewed more losing proposals than I care to remember. Each time the executives are looking for the problem in the commercials, pricing, or proposition. Things that they can change by reshaping the organisation.

What I discovered, after creating this toolkit, is that the problem often exists in the quality of what we have sent. The proposal is complex, poorly written, reads in different styles, does not answer the questions, and does not express why our proposition is the right choice.

Let us face it, we do not think that our customer is eagerly awaiting our proposal, and those from all our competition like a child waiting for Santa Claus. They know they have a hard task in front of them. When we give a poor proposal, do you think they really take the effort to try and work out what we meant? Or is it more likely that they stop reading and start scanning, missing key messages and discriminators and, as a result, marking us down.

The good news, is that these factors can be fixed within your organisation in simple solutions that do not involve having to redesign your products or solutions, change your commercial risk or drop the price.



To be confident of winning, you need to have a high-quality proposition and a high-quality proposal. One without the other means you can lose deals that you expected to win.

The challenge of creating a high-quality proposal is that it is either seen as an artistic activity or it is a science. People may be happy to sit down with a blank sheet of paper and fill it with words and graphics, must as a painter can create a piece of art. There is the nub of the challenge. I could look at a piece of art and consider it to be rubbish, whilst someone else could think it was the most beautiful, powerful painting they had ever seen. Beauty is in the eye of the beholder. We are both being subjective and apply our own sub-conscious rules to what we think makes a great piece of art. So is the challenge with proposals. You may have two people reviewing a proposal and one would think it is close to being ready to submission and the other may be on the edge of escalating the quality of it to the Head of Sales as they think it is an insult to the professionalism of the organisation.

Both are right in their own minds. One can point to all the things they like and the other can highlight all the failures. They are both being subjective. They both have different reading styles.

If you consider who we tend to use to review our proposals, internally, then it is likely to be someone experienced within the game of sales. They may be an expert in writing. The problem is that we are not in the game of sales here. We are in the game of buying.

The customer is reading the document to make a buy decision.

Therefore, we need to ensure that we understand the factors that make our document compelling for the buyers.

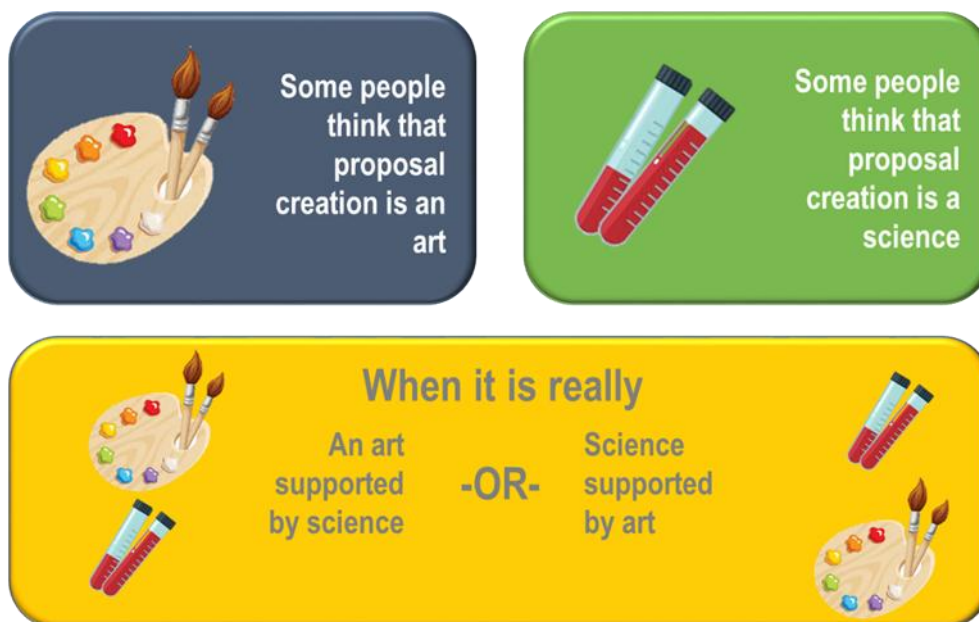
This is where science can take over. We can apply strong rules to ensure that our proposal includes these factors.

I have seen organisations that say that the Executive Summary must be between 3 and 5 pages. Well, that may be a good marker, but what if, on a specific deal, we only need 2 pages to convince the customer to buy from us? Should we continue writing, just to meet the internal rule? In doing so, we may reduce the quality of the Executive Summary and put the win at risk.

There are also organisations that have developed automated Executive Summary creation tools. You type in the customer's name, proposal name and ticks about the ingredients of the proposition and the tool pulls out articles of standard text. It then formats this into an Executive Summary, with cover art and commercial statements. Ready to go, will little effort.

What about that poor person we call the buyer, where in this approach have, we considered their reading style? Where have we ensured that the messaging is tight for this customer's unique requirements and business imperatives?

Science kills the creativity, and it is the creativity that helps us to win. However, art alone ignores the science of reading and results in a proposal that your customer either likes or hates. Is it a gamble we wish to take?



Some people see proposal creation as an art, others a science. To create a high-quality proposal, you need the right mix of both.

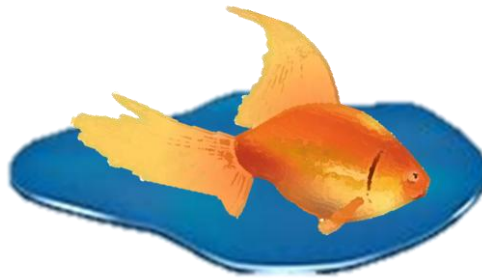
1.1. The power of Loose / Tight theory.

There are great books about Loose / Tight theory, so I do not plan in producing my own here. The easiest method to explaining it is the fishbowl analogy.

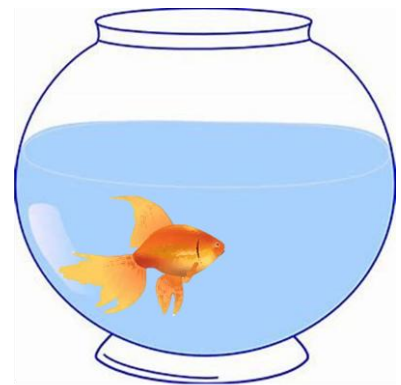
If you place a fish into a bowl that is too small (tight), it will eventually suffocate and die. If we apply tight processes around everything we do in presales, we deny our team to use their brains and think creativity. Tight, is fine for automated factories where robots produce the product. We are looking for the consistency and do not want robots to be creative in the design. In our proposals we do want our bid team to think creatively as each bid is unique, it is for a customer, at a certain moment in time, to resolve a need that is relative to their business imperatives and for a proposition that is built on the knowledge of previous deals.



Bowl too small for the fish.
Too much structure stifles creativity



No bowl for the fish.
No structure means no consistency



Right sized bowl for the fish.
Enables creativity and consistency

In presales, we want a good-sized fishbowl that constrains us from making mistakes that we made before and allows for us to be creative in producing the proposition and proposal that compels the customer to buy from us.

If we do not give the fish a bowl to swim in (loose), it will flap in the water until it eventually suffocates and dies. If we do not place guidelines and structures around our bid teams, then they will make the same mistakes of other teams and produce proposals that they may love, but the customer does not.

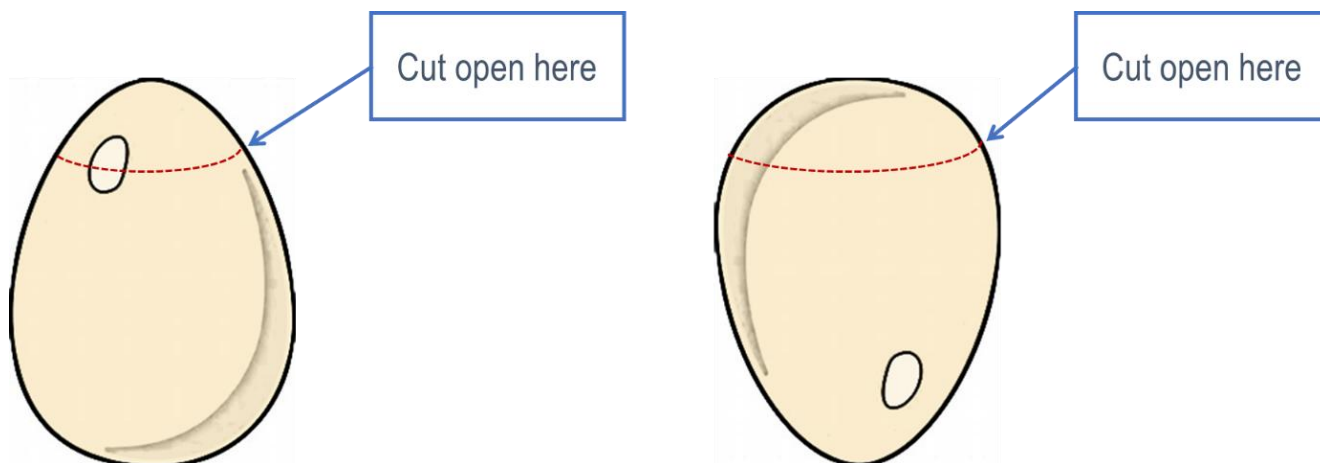
If money is not the driving force for an artist, then Loose is great for them. Every day, they can wake up and decide on what they will paint. They can use whatever materials they wish and apply whatever techniques makes them happy. When the artist finishes, it only matters whether they like the result or not.

Loose / Tight means that we need to apply structure to direct our bid teams creating the proposal using industry knowledge and best practice. However, we want them to work in a loose manner, able to focus their experience and skills onto the uniqueness of this bid.

Bid Alchemy develops all its guides and tools based on this theory.

1.2. Traditional reviewing methods are just too subjective.

The traditional method for reviewing a proposal, is to freeze its development and to ask one or more people to read it and come back with comments. The problem with this approach is that the reviewers are just acting subjectively. At best they are reviewing against what they think a good document look likes and this will differ with each person's reading style.



In Gulliver's Travels, war broke out over the argument over which end of an egg should be cracked open. Subjectivity in proposal reviews can be as heated.

Subjective views from reviewers are facts in their heads. It is their belief, and it is extremely hard to get to understand whether their comments are their beliefs or something that affects the compelling nature of your proposal.

If we undertake this traditional approach, we need to gather the comments from the reviewers and decide what to do. First, we must conquer the challenge of which end of the egg to open. We cannot appease two reviewers when one says the text is too long and the other says it is too short. So, we need to decide which of these two reviewers to agree with. By doing so, we are applying our own subjective view. We tend to agree with the review whose comment is most akin to our reading style.

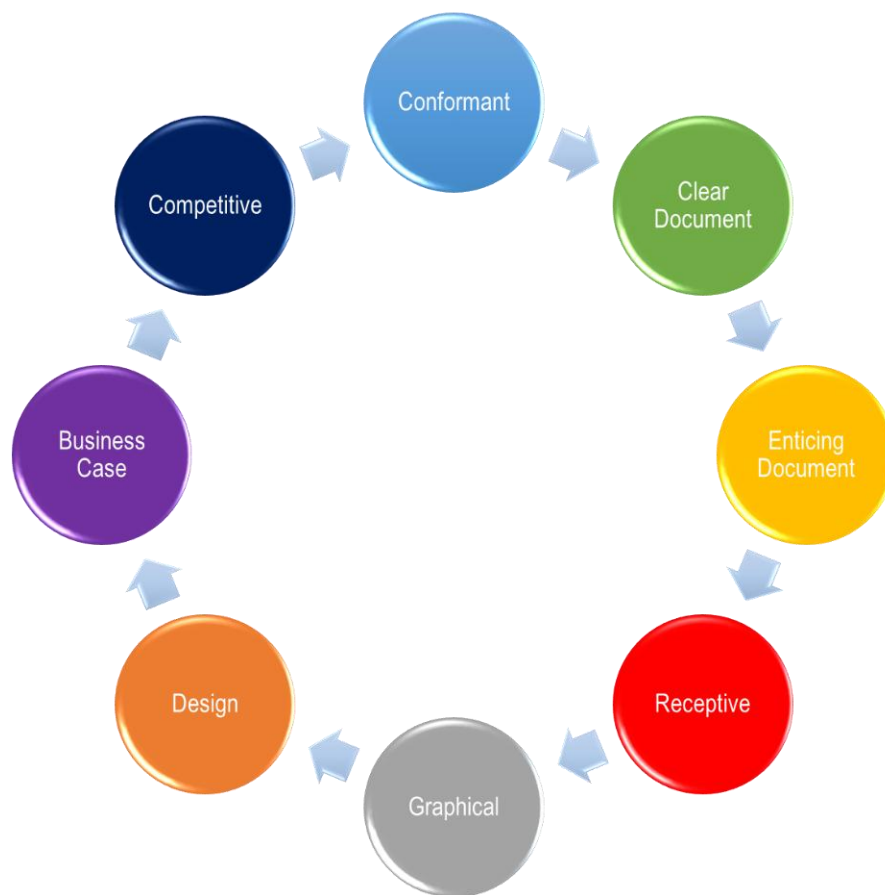
We then need to decide on the priority of the comments and, if we have not enough time, which to action and which to ignore. Again, this is us acting subjectively.

The other challenge with this approach is that there is no general learning from the review. The next bid team is just as likely to make the same mistakes in their proposal.

So, this traditional approach is, at best, hit and miss. However, there is another traditional method that we tend not talk about. That is where the creation of the proposal is running late, and we decide that we do not have time to do a formal review. Effectively, we are happy to send the proposal because it looks complete and anyway, we have run out of time.

Bid Alchemy, with the Alchemy Proposal Toolkit, have undertaken research on the science of what makes a document appealing and easy for a buyer to read. We describe this research and supply advice and guidance on how to use this to improve the quality of your proposals. This is available in the Bid Alchemy **"How to improve the quality of your proposal"** guide. The guide supplies advice on how you can work on one element to improve your own personal writing style.

It also names the 8 attributes of a high-quality proposal. It is these attributes that the Alchemy Proposal Toolkit uses as the foundation for measuring the quality of a proposal.



To have a high-quality proposal, you need consider each of these eight attributes.

The toolkit breaks these attributes down into components (subject areas) that align to those within the guide. For each of components there are elements that are based on the science of writing and gathered over years of creating winning proposals.

In our approach, the reviewer, scores each of these elements. There is a support guide to aid them in this scoring, but it does allow for them to use their own subjective view. However, this subjectivity is now in the constraints of the toolkit, so it is their considered view within the tightness of the science.

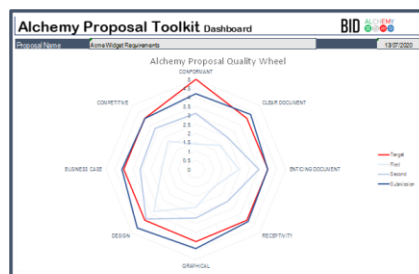
We do want this level of subjectivity because the people reading our proposal and evaluating it (the buyers) are also human beings with their own emotional, rational, and political mindsets. To find out more about this, you should read the Bid Alchemy guide, “**How people make buy decisions**”. Remember we are dealing with a science acting as an art, pertaining to be a science.

2. Welcome to the Proposal Toolkit.

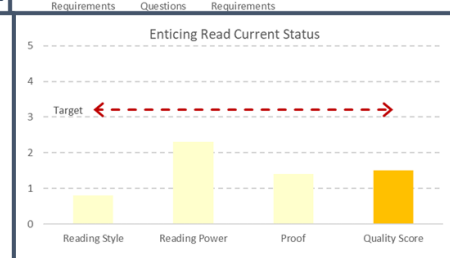
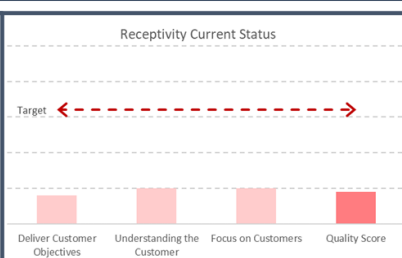
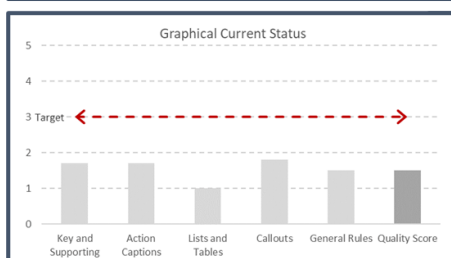
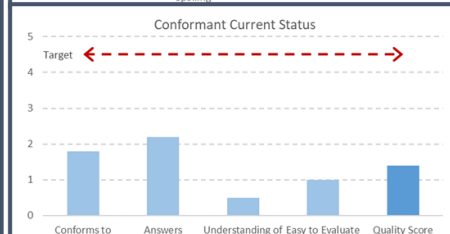
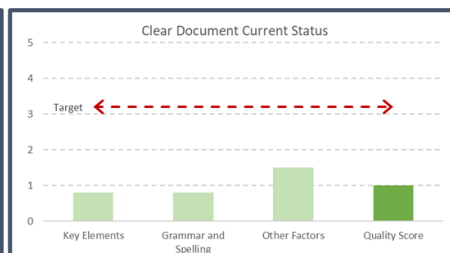
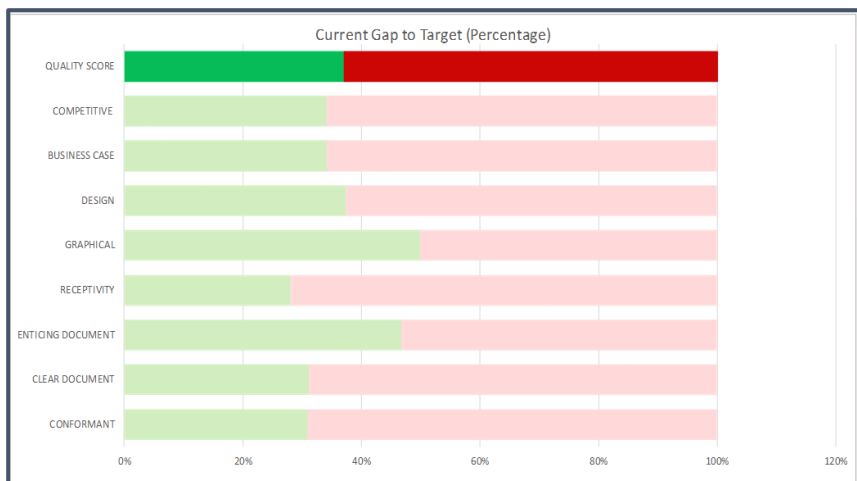
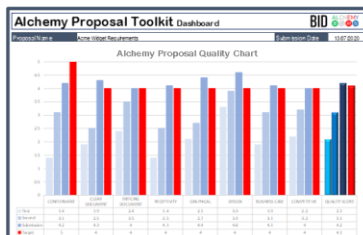
The Alchemy Proposal Toolkit is an Excel Spreadsheet and YOU need to open a new clean copy for each time you wish to set up a proposal for review.

Component	Score	Comments	Target	Actual	Weighted	Score	Comments	Target	Actual	Weighted
CONFORMANT	100		100	100	100	100		100	100	100
ENTICING DOCUMENT	100		100	100	100	100		100	100	100
CLEAR DOCUMENT	100		100	100	100	100		100	100	100
RECEPTIVITY	100		100	100	100	100		100	100	100
DESIGN	100		100	100	100	100		100	100	100
GRAPHICAL	100		100	100	100	100		100	100	100
BUSINESS CASE	100		100	100	100	100		100	100	100
COMPETITIVE	100		100	100	100	100		100	100	100
QUALITY SCORE	100		100	100	100	100		100	100	100

Component	Score	Comments	Target	Actual	Weighted	Score	Comments	Target	Actual	Weighted
CONFORMANT	100		100	100	100	100		100	100	100
ENTICING DOCUMENT	100		100	100	100	100		100	100	100
CLEAR DOCUMENT	100		100	100	100	100		100	100	100
RECEPTIVITY	100		100	100	100	100		100	100	100
DESIGN	100		100	100	100	100		100	100	100
GRAPHICAL	100		100	100	100	100		100	100	100
BUSINESS CASE	100		100	100	100	100		100	100	100
COMPETITIVE	100		100	100	100	100		100	100	100
QUALITY SCORE	100		100	100	100	100		100	100	100



Component	Score	Comments	Target	Actual	Weighted	Score	Comments	Target	Actual	Weighted
CONFORMANT	100		100	100	100	100		100	100	100
ENTICING DOCUMENT	100		100	100	100	100		100	100	100
CLEAR DOCUMENT	100		100	100	100	100		100	100	100
RECEPTIVITY	100		100	100	100	100		100	100	100
DESIGN	100		100	100	100	100		100	100	100
GRAPHICAL	100		100	100	100	100		100	100	100
BUSINESS CASE	100		100	100	100	100		100	100	100
COMPETITIVE	100		100	100	100	100		100	100	100
QUALITY SCORE	100		100	100	100	100		100	100	100

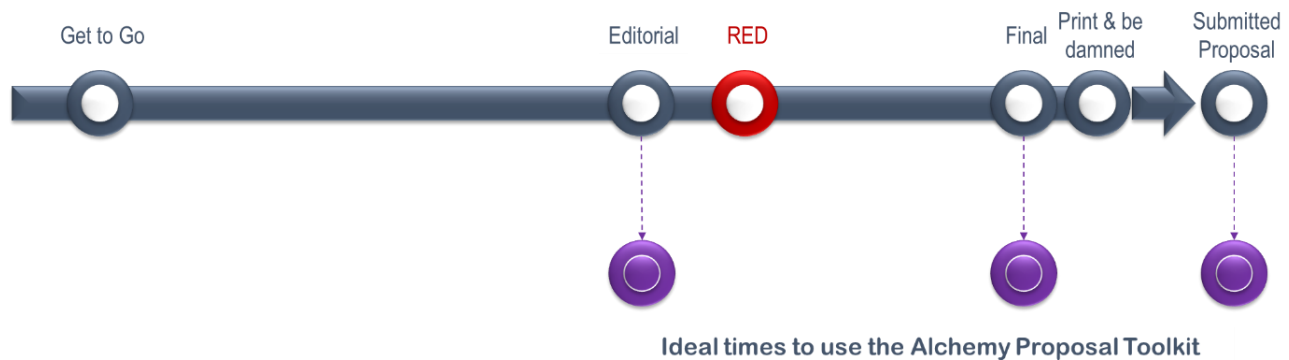


The Alchemy Proposal Toolkit is a simple to use method for measuring the quality of your proposal. It will enable you to lift the quality and save valuable time.

2.1. When should you review your use the toolkit?

The best place to start is at the beginning of your proposal creation project. I would suggest that it should be a discussion point within the Storyboard event to set the target for the quality you are aiming for.

The Proposal Manager will then wish to set up the toolkit, incorporating any customer proposal requirements within their tender documents. For example, if the customer has said that there should be no graphics, this should be calibrated within to tool.



The ideal times to use the Alchemy Proposal Toolkit is as part of your formal document reviews. It will make these reviews more valuable and result in fewer quality issues at the end of proposal creation.

Bid Alchemy recommend that you incorporate the use of the toolkit into the formal reviews you plan to hold during proposal creation. The Bid Alchemy Guide “**When and how to review and edit your Proposal**” is available to you. This provides you with our recommend approach to undertaking these important quality gates.

You will see that we also suggest reviewing the final proposal once you send this to your customer. This enables your organisation to collate the quality of final documents, which becomes valuable. It enables you to find common issues with proposal quality and implement improvements across your Presales environment.

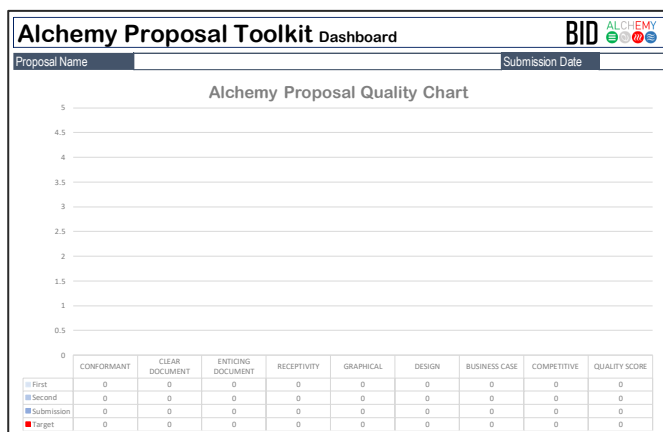
2.2. Setting up the toolkit for a bid

Your first decision should be on whether you wish to review the proposal as a whole or in sections. A common approach that Bid Alchemy recommend is that you review, as a minimum, the Executive Summary separately to the main content of the proposal.

The more you break down the proposal into reviews, the greater the value of the feedback. For example, you may find that section 2 scores highly and section 3 has significant challenges. You can then focus your actions on the sections that need it most. However, the more you break the proposal down, the more reviews you need to do. So there needs to be a balance between the available time and resource and the ability to focus on a section-by-section basis.

Whilst I value the feedback that undertaking section reviews supplies me, I find I can only justify this approach on the high value (mega deal) or “must win” deals.

Start with a clean version of the toolkit and click onto the **Dashboard** tab.



You will see that this is very empty, as you would expect. The only information you need to add is the name of the proposal and the submission date.

Bid Alchemy recommend you now save this with a unique name, just adding the customer and proposal name to the standard file name.

You now have a unique version of the toolkit for this bid. This is the version you should open each time you wish to undertake a review.

If you now move to the **Settings** tab, you now need to calibrate the toolkit for the unique requirements and targets for this proposal.

There are two elements to this, Review Requirements and Targets.

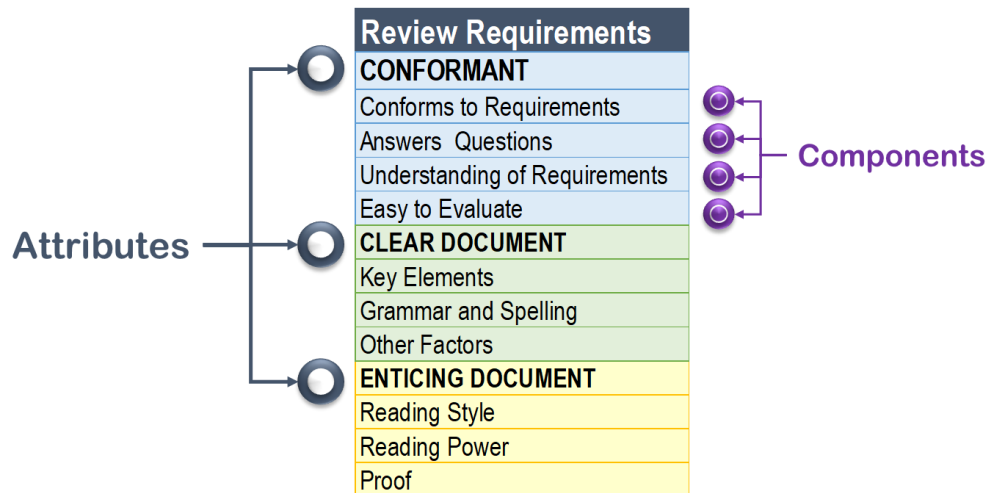
For Review Requirements, you can see the eight attributes of a high-quality proposal.

Within each of these are the list of components that together create the attribute.

ATTRIBUTE	USE	COMPONENTS
CONFORMANT	USE	Conforms to Requirements
RECEPTIVITY	USE	Deliver Customer Objectives, Understanding the Customer, Focus on Customers
DESIGN	USE	Cover Art, Page Layout, Other Page Layout, White Space, Customer Branding, Headings
COMPETITIVE	USE	Benefit Statements 1, Benefit Statements 2, Discriminators, Competitive Strengths
CLEAR DOCUMENT	USE	Easy to Evaluate, Key and Supporting, Action Captions
ENTICING DOCUMENT	USE	Grammar and Spelling, Lists and Tables, Callouts, General Rules
GRAPHICAL	USE	
DESIGN	USE	
BUSINESS CASE	USE	Value Proposition 1, Value Proposition 2, Worries and Concerns, Why Us
COMPETITIVE	USE	

Select the target score for each of the attributes. This is the target that you believe you need to achieve to produce a winning proposal for this customer.

Review Requirement Settings



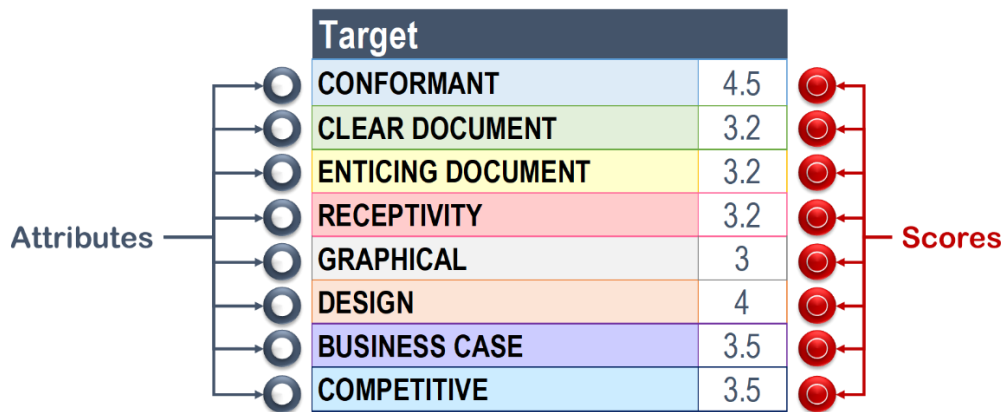
The Alchemy Quality Toolkit measures across the eight attributes Each attribute consists of components.

RECEPTIVITY	USE
Deliver Customer Objectives	Yes
Understanding the Customer	Yes
Focus on Customers	Yes
GRAPHICAL	USE
Key and Supporting	Yes
Action Captions	Yes
Lists and Tables	Yes
Callouts	Yes
General Rules	Yes

You can select which components you will score within the quality review. These are all set to yes as we recommend that you review all components unless there is an assertive reason not. For example, your customer may have set a rule that the proposal should not have any graphics. In this instance you click on the yes button and select no for the related components within the graphical attribute. This may be, Key and Supporting, Action Captions, Callouts and General Rules. You would keep Lists and Tables as yes, as the rules allow for this in your proposal.

We describe each of these components in the “**Bid Alchemy Proposal Toolkit Scoring guide**”. So, it is useful to have this available whilst you are undertaking this task. However, over time, this becomes quite intuitive, and you find you can undertake the settings quickly and without having to refer to the guide.

Target Setting



By setting a target for each attribute, you are assertively measuring and developing the quality of your proposal.

For each attribute, you set a score between 0 and 5. 5 being the achievement of perfection.

You may wish to set a minimum score that is acceptable for any proposal within your organisation, for example 3.5. This is an approach that Bid Alchemy recommends. If you set a target, then it gives your bid teams something to aim for and this alone drives higher quality proposals. We explain more about this in section 4.

You may wish to apply specific targets for the proposal you are working on. For example, if the buyers tend to prefer graphical documents, you may wish to lift the graphical element to 4.5.

In general, the conformant score should be high. If you think about it, the customer can disqualify you, for non-conformance.

Regularly, a Sales Director, asks, “*Why not set the score to 5 for all attributes?*” Whilst this may look like a sensible desire, it means producing the perfect proposal. Despite working and reviews thousands of proposals, we have never seen the perfect proposal.

To produce such a document, even if it were possible, would involve more resource and investment than your bid budget will allow and even then, you may not have a time.

We recommend that you start with a target between 3.0 and 3.5. As you collate the quality scores from proposals, you will find the average of what you are currently achieving. You can then agree a minimum target above the average. This average score may differ between your organisation and others as it will be dependent on the current level of performance and the rigour of your reviewers.

Once you have set your targets, your Alchemy Proposal Toolkit is ready for the reviews. Remember to save it!

In Turkey they say, “To be perfect is an insult to Allah, that is why there is a mistake in every Turkish carpet.”



2.3. How to undertake the reviews

As with any formal review, you require the proposal, or section under review, to be frozen. If the content owner is still working on it whilst it is under review, then the feedback will not relate to the current document.

You provide the reviewer with a copy of the tender document (or a list of the conformance requirements), the document for review and the Alchemy Proposal Toolkit that you have previously set up. They should also have a copy of the “Bid Alchemy Proposal Toolkit Scoring guide”. This will be a useful aide-memoire for them, if they want a better understanding of what they should be evaluating on when scoring a specific element.

Alchemy Proposal Toolkit 1st Review							BID ALCHEMY 	
CONFORMANT	USE	SCORE						
Conforms to Requirements	Yes	0	Page Count	Layout	Format	Naming Convention	Submission	Other Requirements
Answers Questions	Yes	0	Complete answers	Clear	Explains how	Details Benefit	Provides Evidence	Additional Features
Understanding of Requirements	Yes	0	Clear	States their needs	Addresses their needs	Details value	Consistent benefits	Provides Alternatives
Easy to Evaluate	Yes	0	Easy to navigate	Key information 1st	Compliance obvious			
		0						
CLEAR DOCUMENT	USE	SCORE						
Key Elements	Yes	0	Short sentences	Customer language	No excess words	Active voice	Positive writing	One voice
Grammar and Spelling	Yes	0	Grammar Quality	Grammar Consistency	Spelling	No wrong words	Simple words	
Other Factors	Yes	0	Cross-referencing	Structure & flow	Introductions	Free of ambiguity	No stereotypes	Confident tone
		0						

The scoring mechanism gives the quality measurements for you to be able to find improvements.

The reviewer clicks on the relevant review tab (1st Review, 2nd Review or Submission”. There is a table for each attribute and its constituent components. The use of the component which you previously decided within the settings, is visible. The score is zero as the review has not taken place. If you have decided that a component is not for review and the reviewer later evaluates the elements, that evaluation will not be computed within the model. This means that you calibrate the scores to the requirements you set upon it.

Attributes	CONFORMANT	USE	SCORE				
	Conforms to Requirements	Yes	0	Page Count	Layout		
Components	Answers Questions	Yes	0	Complete answers	Clear		
	Understanding of Requirements	Yes	0	Clear	States their needs		
	Easy to Evaluate	Yes	0	Easy to navigate	Key information 1st		
			0				

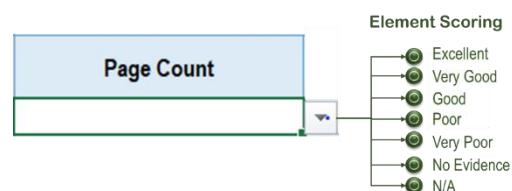
Elements

The Bid Alchemy approach enables the measurement of the previously subjective decision on whether a proposal is good or not.

The elements are all the factors that have influence as to whether your customer will find the proposal enjoyable to read, easy to understand and compelling. By using the elements within your proposal, your customer will evaluate your proposal higher. They understand your messages and the benefits you supply them. They also have enjoyed reading your proposal (and that may be a rare occurrence for them) so their subconscious is in a positive mood. Positivity results in positive evaluation.

After reading the proposal (or section for review), the reviewer is ready to start the evaluation.

For each element they apply their judgement on how well it is portrayed within the proposal. They do this by clicking on the relevant element and selecting from the drop-down menu that appears. They select from excellent down to no evidence. N/A means that this element is not applicable (in their opinion) to this proposal. This element does not compute within the quality score.



This is the opportunity for the reviewer to use their experience to make decide on the correct score. This is where we allow subjectivity to take place. It is true that two reviewers then may make different decisions, and this could result in a different quality score. Bid Alchemy like this approach. The customer will be using different buyers to evaluate, and they too may make a different evaluation.

From experience, this use of subjectivity only results in the total quality score differing by a small margin (less than 0.2). This gives an opportunity for debate, “*Why did you score this at poor and you at excellent?*”.

If there is a significant difference in scores, then the Bid Manager, would review it to see which reviewer is right. Remember reviewers are human too. One may have come into work in the pouring rain, their umbrella may have failed, they may have been late for their first meeting and not had time for coffee. I suspect they will score more negatively than they would on a better day.

CONFORMANT	USE	SCORE						
Conforms to Requirements	Yes	1.8	Page Count	Layout	Format	Naming Convention	Submission	Other Requirements
			Good	Poor	Poor	Good	Very Poor	No Evidence
Answers Questions	Yes	2.2	Complete answers	Clear	Explains how	Details Benefit	Provides Evidence	Additional Features
			Very Good	Poor	Poor	Good	Very Poor	Very Poor
Understanding of Requirements	Yes	0.5	Clear	States their needs	Addresses their needs	Details value	Consistent benefits	Provides Alternatives
			Very Poor	No Evidence	No Evidence	Very Poor	Very Poor	No Evidence
Easy to Evaluate	Yes	1	Easy to navigate	Key information 1st	Compliance obvious			
			Very Poor	Very Poor	Very Poor			
		1.4						
CLEAR DOCUMENT	USE	SCORE						
Key Elements	Yes	0.8	Short sentences	Customer language	No excess words	Active voice	Positive writing	One voice
			Poor	No Evidence	Very Poor	Very Poor	Very Poor	No Evidence
Grammar and Spelling	Yes	0.8	Grammar Quality	Grammar Consistency	Spelling	No wrong words	Simple words	
			Very Poor	Very Poor	No Evidence	Very Poor	Very Poor	
Other Factors	Yes	1.5	Cross-referencing	Structure & flow	Introductions	Free of ambiguity	No stereotypes	Confident tone
			Poor	Poor	Very Poor	Very Poor	Poor	Very Poor
		1						
ENTICING DOCUMENT	USE	SCORE						
Reading Style	Yes	0.8	Enjoyable read	Learn for it	Distinctive voice	Relevant to customer		
			Very Poor	No Evidence	Very Poor	Very Poor		
Reading Power	Yes	2.3	Thought provoking	Credible	Commitment evident	Evokes emotions		
			Poor	Good	Good	Very Poor		
Proof	Yes	1.4	Independent proof	Relevant facts	Accurate facts	Current facts	Persuasive	
			Very Poor	Poor	Very Poor	Poor	Very Poor	
		1.5						

As the reviewer completes the evaluation, the scores are computed by component and attribute. This scores for the attributes and the total quality score.

Once the evaluation is complete, the tool gives the scores for the components and attributes. The reviewer has now completed their task; however, you may wish to contact them later for any queries over the scoring on specific elements.

You are now able to see the relevant quality scoring within the dashboard.

2.4. Using the dashboards to identify improvements

The Alchemy Proposal Toolkit provides you with multiple views of the data to enable you to track your progress, identify the attributes and components that you need to focus your attention on and to identify whether you have achieved your goals. We explain each of these charts and their purpose below.

The Proposal Quality Chart



After 1st Review



After all 3 Reviews

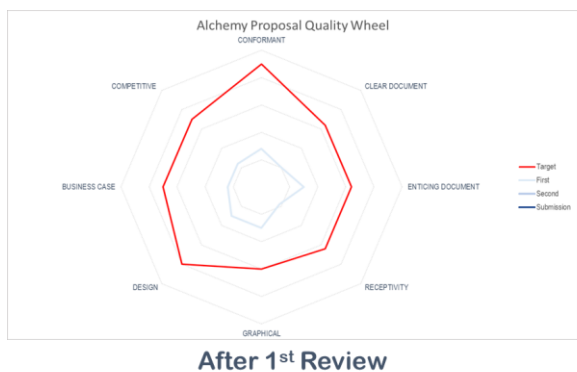
The Alchemy Proposal Quality Chart provides you with the scoring for each attribute, the targets, and the total quality score for your proposal.

At this stage, we have only completed the 1st review, however you can see the chart for this and after the full reviews above. In this example all attributes are below the target scores. From the 1st review chart, we know that we have work to do on all aspects of the proposal before it is suitable for submission. This should not be a major surprise, given the early stage of its development. However, we should consider, in this example:

- ☞ The conformance score is low – most conformance elements concern meeting customer proposal requirements. The Proposal Manager should review correct these before the content writers resume their writing.
- ☞ There will need to be a full edit of the document by the Proposal Manager, and the Bid Manager needs to give time within the proposal creation timetable.
- ☞ The graphical elements are low. Should we consider using a graphical designer to lift the quality and quality of graphics? Should the Proposal or Bid Manager look at developing more callouts to support the content writers?
- ☞ The Business Case and Competitive attributes are low, this says that we do not have strong messaging, discriminators, and Value Proposition. Should the Bid Manager facilitate a workshop to strengthen these?

When you have a chart like this, it can be immensely powerful in wakening the bid team to the smart thinking and working we are going to need to do to achieve the target. As we can direct this towards the focused actions, we are able to make the structured improvements we require.

The Alchemy Proposal Quality Wheel



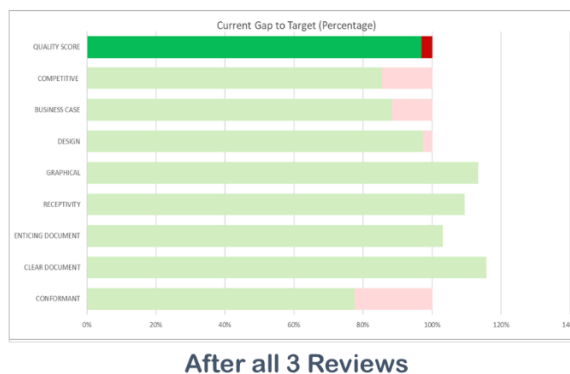
The Proposal Quality Wheel gives a different view to the same quality data. Bid teams may find it easier to talk around the challenges to improve, using this view.

The Alchemy Proposal Quality Wheel shows the same data in a different format. This view is often better for when you are holding a meeting to review where the bid team need to focus their efforts.

Here the delta between where we are (after 1st review) and target is clear. This is often the case. As you can see from the same picture, after the three reviews, the level of improvements.

For continuous improvements on proposals, you can see the attributes that you did not reach the target. If this is common across bids, then it is a good subject for finding improvements within your Presales team.

The Alchemy Gap to Target chart



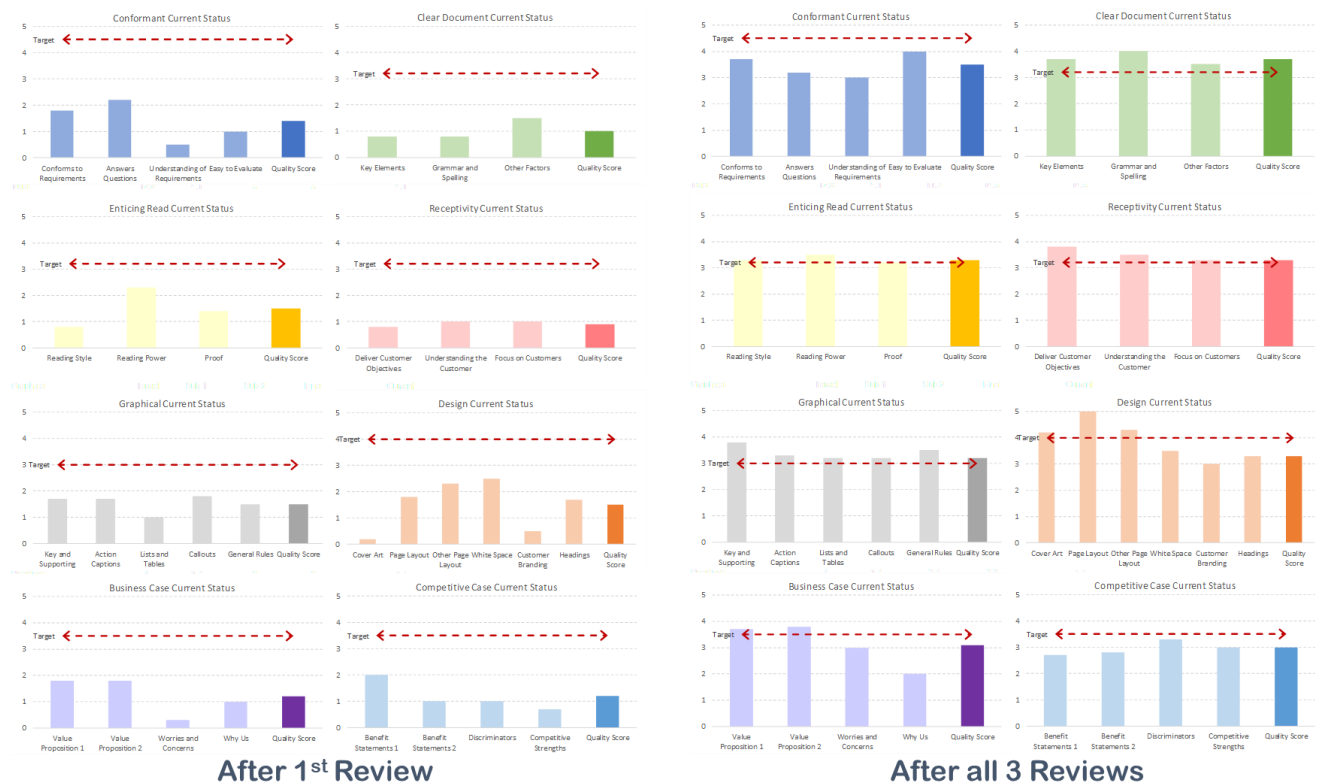
The Alchemy Gap to Target Chart enables you to see the greatest deltas between attribute quality and target.

The Alchemy Gap to Target Chart presents the delta between current attribute and proposal quality and target. By normalising the targets (making them 100%) and the current performance (as a percentage of target), it makes the deltas obvious.

From the 1st review chart, you can see we need to undertake work all areas, but receptivity, clear document and conformance are noticeably clear.

The chart after all three reviews shows that we did not reach target overall, but we did over-achieve in some attributes (the only green ones). This is especially useful for continuous improvement. Did we do something different or use a new tool that enabled us to overachieve? If so, is this something that we can now deploy across all bids and make it a common good practice?

The Alchemy Component Gap Charts



The Alchemy Component Gap Charts enable you to inspect which components within an attribute require most improvement.

The Alchemy Component Gap Charts depict the current quality of each component within an attribute. For each, you can see the gap to the relevant target.

This enables you to undertake a deeper dive into finding the right actions to undertake to make the greatest quality improvement to your proposal.

This links in very well with the Bid Alchemy **“How to improve the quality of your proposal”** guide. You can review this document and take advance on the components and elements within. This will help you find the small changes that you need to undertake, to increase the overall proposal quality.

2.5. Gaining value from the data

Within chapter 4 you can find out how you can exploit the value of the data that you have gathered through using the toolkit to review your proposals.

Bid Alchemy provide you with a report tool to enable you to combine your performance and measure this against your targets.

If you open the Alchemy Proposal Consolidation Report, you will see a familiar dashboard.

Alchemy Proposal Consolidated Report					
SET ANNUAL QUALITY TARGETS		TARGET FROM PROPOSALS TO DATE		ACHIEVEMENT TO DATE	
CONFORMANT	4.5	CONFORMANT	1.8	CONFORMANT	1.5
CLEAR DOCUMENT	3.8	CLEAR DOCUMENT	1.4	CLEAR DOCUMENT	1.5
ENTICING DOCUMENT	3.8	ENTICING DOCUMENT	1.4	ENTICING DOCUMENT	1.4
RECEPTIVITY	3.8	RECEPTIVITY	1.5	RECEPTIVITY	1.5
GRAPHICAL	4.0	GRAPHICAL	1.4	GRAPHICAL	1.4
DESIGN	4.0	DESIGN	1.7	DESIGN	1.6
BUSINESS CASE	3.6	BUSINESS CASE	1.6	BUSINESS CASE	1.3
COMPETITIVE	3.6	COMPETITIVE	1.5	COMPETITIVE	1.3
QUALITY TARGET	3.9	QUALITY TARGET	1.5	QUALITY TARGET	1.4

The Alchemy Proposal Consolidated Report enables you to set the annual targets for the quality of your proposals and drive your organisation to quality improvements.

Each year, we recommend, that you set a target for the quality of your proposals. Organisations may use this as the minimum acceptable level of any proposal. In others it is an overall blend with the understanding that the targets for each proposal may differ.

Once you have set the targets, save the report with a suitable name. You will need to open this report, each time you have completed a 'Submitted Proposal Review'.

When you have a completed Alchemy Proposal Toolkit (the proposal has been submitted to the customer and you have completed the final quality review), you should transfer the required data across to the report.

To make this simple, there is a button on the dashboard that will copy it for you.

Alchemy Proposal Toolkit Dashboard						BID 	
Customer	International Global PCL			Proposal Title	Provision of Widgets		
Bid Manager	Martin Eckstein			Proposal Manager	Sam Proprof		
Reviewer	Jo Scrutiny			Submission Date	20/07/2021		
1st Review Date	05/06/2021		Second Review Date	27/06/2021		Sub Review Date	22/07/2021
Consolidated Reporting Code							
When you have completed the Submission Review, you should use the information to gain a consolidated view of proposal quality in your organisation.							
Click on the button to copy the information for your Alchemy Proposal Consolidate Report. Remember to select month in the report before pasting.							
							Click Here

On the dashboard of your toolkit, you will see a button. Clicking this collates that data required to develop your consolidated report.

When you have copied the data, you need to go back to the report. There is a tab for each month. Click on the right month and click on column A, just outside the table, in the first free row.

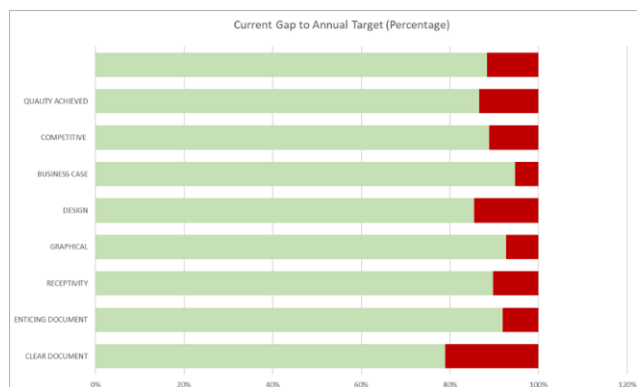
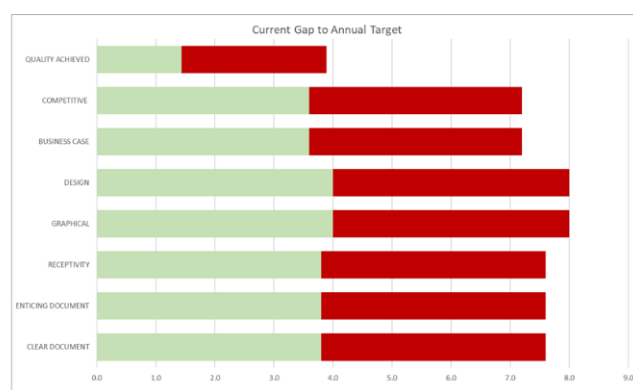
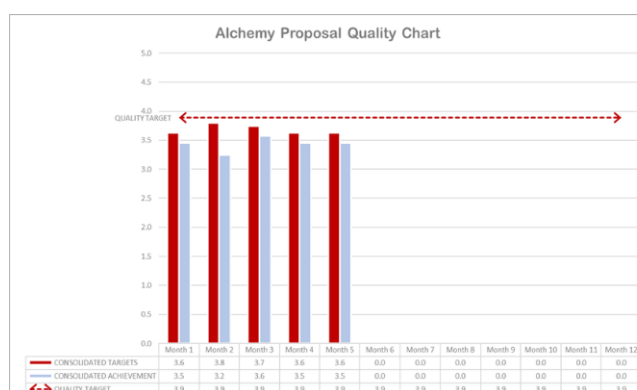
Alchemy Proposal Consolidated Report Month 2 Data										BID 	
Paste your data in column A (Paste Values) of the next available row below.											
Customer	Proposal Title	Bid Manager	Proposal Manager	Reviewer	Submission Date		Target	Quality Score	Conformant Target	Conformant score	Clear Doc Target
International Global PCL	Provision of Widgets	Martin Eckstein	Sam Proprof	Jo Scrutiny	20/07/2021		3.8	3.0	4.0	3.8	3.5
Widget Corp	Provision of Widgets	Martin Eckstein	Sam Proprof	Jo Scrutiny	20/07/2021		3.6	3.8	4.3	3.6	3.5

Column A is the column before the start of the table.

The report enables you to collate all data by month of submission.

You now just need to click on Paste and select the Value option.

The data is now in your report, so it is worth saving again.



The dashboard provides you with familiar reports that you can use to drive consistent improvements across all your proposals.

3. Making this part of your Best Practices in Presales

Once you have used the Alchemy Proposal Toolkit on a few bids, you will become adept at using it and see the value it delivers. The value is in aiding you to find improvement requirements, but you should also notice that the back-end period of proposal creation is less hectic. You have managed to bring forward problems that would need to happen and dealt with them before they cause a major challenge.

Now is the time to consider whether you wish to build the deployment of the toolkit into your bid process.

We release the real value once it is common practice across all your bids.

While it would be easy just to buy licences and tell everyone in presales that they must use it on their proposals, this method is open to failure.

It is important that you consider the following factors (these are standard factors that I would consider for any process or Best Practice changes within Presales:

- **Stakeholders buy-in.** You need the key stakeholders to fully understand the value of doing this. They need to be advocates to make this stick. The Sales Director is an important stakeholder; you need them talking to the salesperson (at reviews) about the quality of their current proposal.
- **Team buy-in.** The presales team must see the value and feel that they are able to undertake this new Best Practice. They must believe that there is a benefit to them. The benefit to them is that it will enable them to lift the quality of the proposal, save them late nights at the end of the proposal creation project and lift their reputation.
- **User Support.** The new Best Practice will take time to be common sense and practice for the key users. You need to have an expert that they can call to guide them through this early stage.
- **Tenacity.** You need to ensure that it commonly used, that excuses do not come in on “Well this bid is different”. With all change there can be resistance. You may need to give tough love members of team to get them to want to undertake a change.
- **Presenting the value.** Promote the benefits. After you have used the tool in anger promote the quality score now against when you started. Perhaps have award for the highest quality proposal of the year. As you get through a full sales cycle (often about 9 months), measure the win rate from before the deployment and now.



If you are not prepared, proposal creation is 1000 problems waiting to happen

3.1. Bid Alchemy is here to help

This is not a major project, but it does mean added work for you. Bid Alchemy is here to help. We can provide you with a cost-effective service for the implementation of the Alchemy Proposal Toolkit into your Best Practices. As the experts in this toolkit, our efficiencies mean it is more affordable than you may think. We can tailor the service to your requirements.

1. **Bespoken to your business.** We will consult with you on changes you may wish to make to the toolkit. If your organisation has certain requirements for all its proposals, we will tailor the toolkit for your organisation.

2. **Stakeholders buy-in.** We can present to your key stakeholders so that they are supportive of the change, understand the value it delivers for them, and they are aware of their accountabilities in making it a success.

3. **Training event.** We will supply a learning event for your key users. The event will cover, how people make buy decisions and the attributes and components of a high-quality proposal. This is an interactive event; we will tailor it to the needs the attendees express on the day and will include everyone getting to use the toolkit in anger.

4. **Integration.** We will support you in integrating the toolkit into your business processes; by helping you build the processes and templates for measuring across your bids, building the continuous improvement loop and integrating the toolkit measurements into annual personal goals and recruitment (as you require).

5. **Reviewing.** We will undertake a review workshop with your nominated reviewers. This will build their confidence and consistency in review and provide us with a benchmark of your current proposal quality.

6. **Being there.** Just being there to supply the ad-hoc support for questions and queries you have during the first three months as you are building up your own expertise.

Bid Alchemy are also available to provide you with added services that you may wish to use to support your aim of winning more deals. This includes:

- 🟢 **Proposal Quality Reviews.** We are available to undertake the quality review of all or any of your proposals, deploying the Alchemy Proposal Toolkit. We will provide you with the evaluation alongside a list of recommendations for improvement.
- 🟢 **RED Event Reviews.** We can function as independent RED team reviewers for you live bid. We are happy to sign non-disclosures for this and can work either from your offices or remotely.
- 🟢 **Bid Management Support.** We can provide your Bid Manager with regular support events during your key bids.
- 🟢 **Proposal Writing Support.** We can provide you with support in improving the quality of a proposal, during its development, taking pressure away from your Proposal Manager.
- 🟢 **Bid and Proposal Manager Coaching.** We can supply a coaching service to support the development of your Bid and Proposal Managers. Helping them to develop their skills and behaviours to make them as effective as possible.

Having the ability in house is a cost that organisations may not be able to make. Call on us for these capabilities and you then only need to pay for what you need and when you need it.

4. Setting targets to stop customers receiving poor quality proposals

If you twist your body with you finger pointing, you can see where on the wall you are pointing to. Then look half a meter further. Trying the exercise again, focusing on that new point, you will invariable be able to stretch that bit further.

The same is true for the quality of the proposal. If you set a stretching yet achievable target, then it will become your new average for proposal quality. You can then lift the target by a percentage point or two and over the next year, your average will raise again.

With a very rudimentary form of proposal quality measurement, I was set the task of developing an offshore team to deliver proposals with a quality of 3.0. This was a challenge as the traditional onshore approach had only ever got as high as 2.8. Still, I love a challenge, and even with the job of recruiting and developing the new team, we worked with the target in mind. By the end of the first year, we were delivering at 3.2 and winning more deals than the onshore team were managing without our help.

There is no magic to this, people like having targets and in the world of presales, we are naturally competitive, so we want to beat the targets and attain a quality score higher than our colleagues.

Within the Bid Alchemy approach, the Bid and Proposal Managers, refer to the guides and supporting tools to improve the quality of their proposal. So, you do not only get a better proposal, but your presales team are also actively learning.

To make this target approach work, you:

- ➊ Need to set a target and ensure that all bid teams are aware that they you are measuring their proposal quality.
- ➋ Ensure all stakeholders are supportive and actively playing their roles. The Sales Director needs use these measures with their Sales Professionals.
- ➌ Build a tool and process for capturing all the proposal quality scores (Totals and by Attribute).
- ➍ You present the consolidated scores to the Presales team and stakeholders, ideally monthly.
- ➎ The reasons for lower scores (by attribute) enable improvement plans implemented. You can best achieve this within Presales team meetings as a regular workshop.
- ➏ You acknowledge and reward high achievement.

After a sales cycle (9 months or 1 year usually) you can compute whether it has had a positive effect on the win rate. That is your real return on investment.

Whilst this is not a difficult environment to develop, Bid Alchemy will support you within the service described earlier.

5. Creating a Continuous Improvements environment within Presales

Whilst many organisations have implemented Lean Thinking, often this is only clear within production environments. The challenge in implementing Continuous Improvements within Presales, is that, traditionally, we did not have the right measurements.

The Alchemy Proposal Toolkit provides you with measurements that have a direct link to the performance of the team. The supporting guides and tools from Bid Alchemy, supply more paths for increasing effectiveness and efficiencies.

We believe that the best way to eat an elephant in one spoonful at a time. Your team can overload themselves with change if they try to implement everything in the Alchemy guides all at once.

You can set up Lean Communications Cells within your Presales environment, holding regular meetings (daily or weekly) to review team performance and identify areas for improvement and where one Bid Team needs the support of another.

Where I have done this, it has driven a supportive environment within the team. Presales people tend to want to help others. This alone drives improvements within the team. However, the real value is by reviewing the performance measurement. The measures that I collate include:

- ☰ Proposal Quality Score at each review stage
- ☰ Resource time taken to perform presales services (Reviews, Editing)
- ☰ Resource time taken to undertake a full proposal creation project (by complexity, if relevant)
- ☰ Working hours of the Bid and Proposal Manager

Through the Lean approach, the issues are found by the team and then resolved by the team. Each is a small improvement, but these small improvements drive improvements in the performance of the team, which positively affects win rate. It also increases efficiencies; it takes the team less time to perform standard bid activities.

Just as important it lifts the reputation of the Presales team, who are often the poor orphans in the world of sales. By doing so and with the collaborative approach it also drives team motivation.

The question is not why we should do this; it is why we are not doing it already.

Bid Alchemy can support you in building this Lean environment into your Presales team.

6. Setting meaningful goals for you Proposal and Bid Managers

Often the measurements on performance for Bid and Proposal Managers for use in their annual review are fluffy. As traditionally we have had little direct measures, the goals tend to be subjective.

A measure I often see is win-rate. *You are expected to run at a 1:3 win rate.* On the face of it, this looks like a sensible measure and certainly any Bid Manager should want to track their win rate and feel good if it higher than their colleagues. However, environments, may have a sales cycle can be 9 months or longer. So, measuring on an annual basis may mean that the team member only has one completed bid to measure. If they have won it they have a 1:1 win rate, if it was lost then 0:1. That is not a confident measure of performance as there are too few points to measure.

How to demotivate a successful Bid Manager

I worked with a career average of 1:2 win rate, in an organisation that expected 1:3. For the last 5 deals, I was operating at 1:1, unheard of in our business and open to disbelief. *“Martin gets the easy deals”*. All deals are easy once you have won them. The organisation was parachuting me into deals that were going wrong, so I had the hard deals.

I was heads down in one of these “hospital pass” deals. It was a “must win” for the organisation and I inherited it after first short-list, when we were shortlisted to 5th place (out of 5).

I was collaborating with a great team and together, we developed and implemented a new win strategy, we all had to go back to the start and develop from new. Hard work, yet we were working smart and had moved into 1st position, without the competitors knowing.

It was appraisal time, and I was buzzing. We were in contract negotiations, and the margin was great. My boss said, “Well you haven’t actually won any deals this year, so I can only score you average for win rate”. I should have at least won an award for not punching him.

With the Alchemy Proposal Toolkit, you can now use the quality measure as a sensible goal. You can also have goals for leading on an improvement that has increased efficiency and effectiveness. You can even use the efficiency metrics to show the value they have saved the business.

We have had a good deal of experience in setting goals that motivate the individuals to perform and link directly to increased value for the business and reductions in costs. Bid Alchemy are happy to provide this as a service to any organisation implementing this as a best practice.

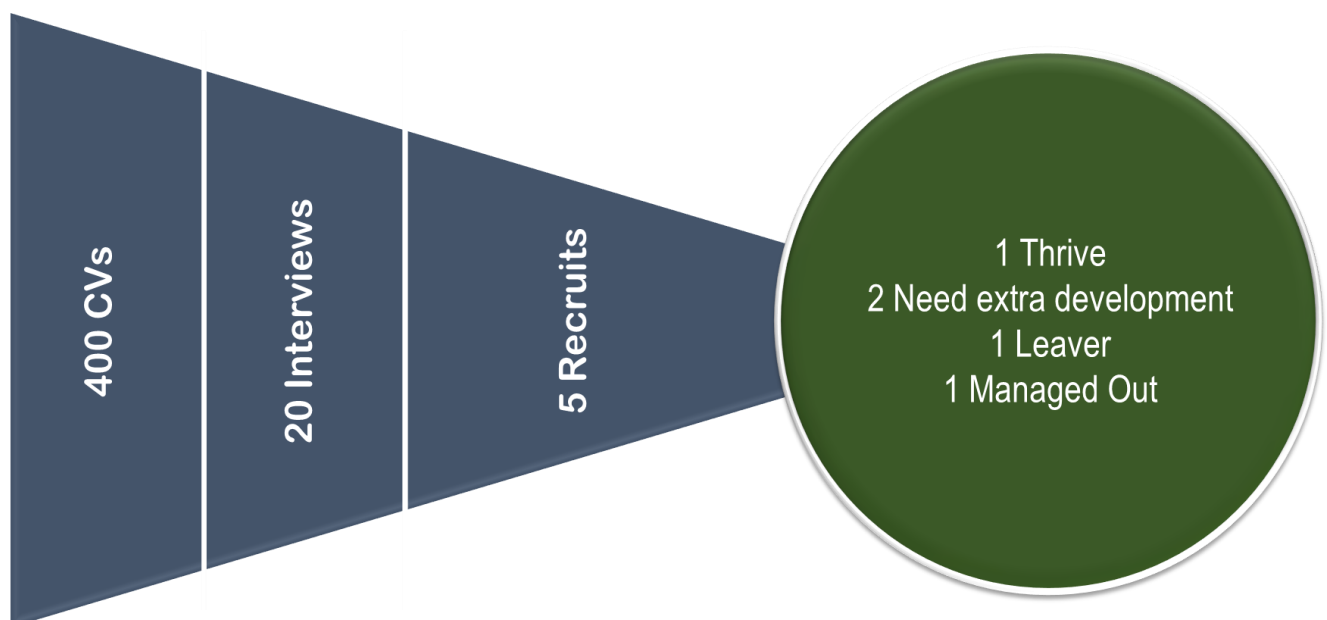
7. Evaluating the capabilities of candidates before you recruit.

Traditional recruitment of Bid and Proposal Managers is often an interview following a sift of CVs. I find this to be “hit and miss”, people can be particularly good at interviewing, yet poor at the role they claim to be an expert in.

In my travels around the world, I have recruited presales teams in countries where fake CVs, certificates and even references are prevalent. So, interviewing alone is not the answer.

I also find that for 20 CVs, you may find 1 suitable candidate and only 1 in 4 candidates are right for recruitment. If you want to fill your days with boring work, then try recruiting a new team of 25 Proposal Managers. The traditional approach would mean 2,000 CVs to sift and I would have to undertake about 100 interviews. Even after this, I would not know if everyone I had recruited would be good at the job and so I would also have attrition to manage.

Traditional Recruitment



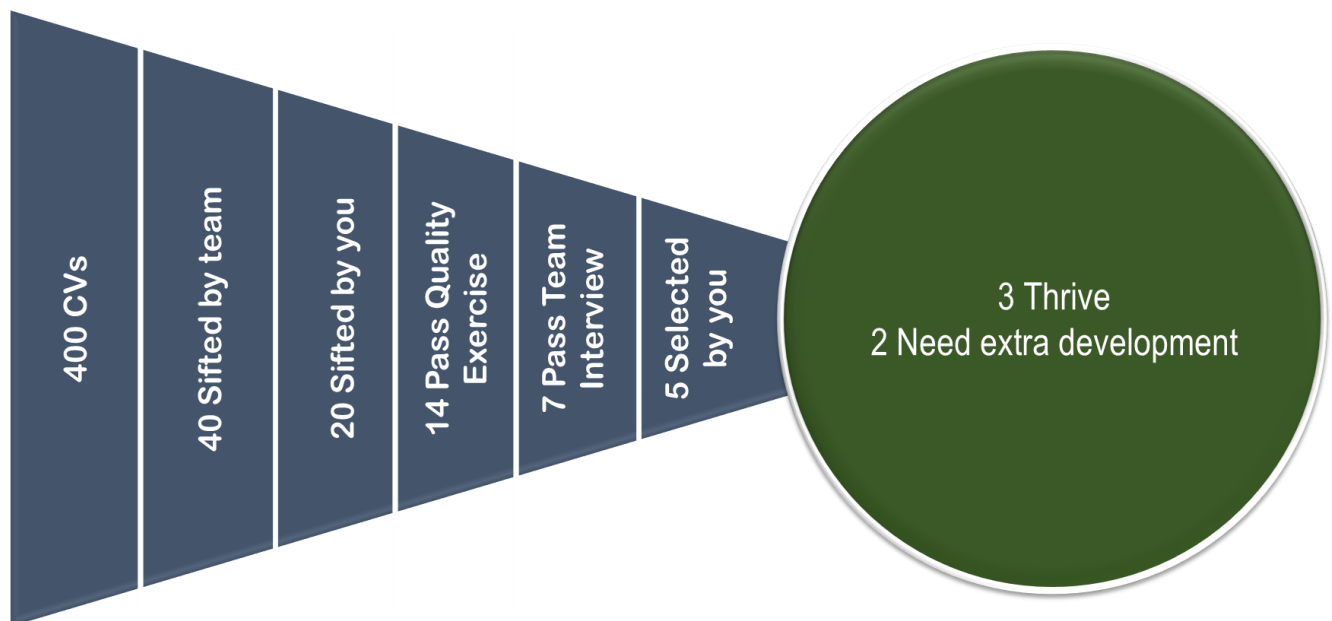
Traditional recruitment of Presales professionals requires significant management overhead and tends not to provide you with the stable and successful team you need.

The Bid Alchemy approach reduces time and management overhead whilst providing you with confidence that you have selected the right people.

- ③ Use your Proposal and Bid Managers to undertake the first sift of CVs. They will remove the candidates that are just not suitable. In practice they will select 2-4 CVs out of 20
- ③ You review the sifted CVs and reduce this to those you are confident have the right skills and experience. This reduces the original 20 to 1 or 2
- ③ Before interviewing, get the candidate to review a proposal built to have a low-quality score (2.0) and within an hour improve it through editing
- ③ Quality score the result. If the score is not above, say 3.2, then thank the candidate for their time, but they will not be interviewed. I find that 2 out of 3 will pass the test

- For those successful, members of your team interview the candidates, in the role. This will give confidence that they understand the role and that their behaviour will make them an ideal candidate. I find that the team will select 1 out of 2 remaining candidates for final interview
- Only now do you need to get involved; you undertake the final interview. This is to a final check that they have the relevant skills and experience. Just as important is to ensure that they will thrive in your business. I look for their ambitions and whether their values are akin to that of the organisation. I also look at whether they are enthusiastic about the role. A good question, especially for Proposal Managers, is what their hobbies are. I have no scientific evidence, but I believe that great Proposal Managers love reading and writing in their spare time

Bid Alchemy Recruitment



The Bid Alchemy Approach reduces management overhead and results in new team members that will thrive and grow in your organisation.

The deployment of the Alchemy Proposal Toolkit has made this possible. It ensures that the candidate can walk the talk, will fit in with the team, will thrive in your organisation and reduced the overhead and cost of recruiting.

Bid Alchemy are happy to provide you with consultancy and support to implement this into your recruitment process.