

Healthcheck

Bidding and pitching to win

РА	CE Healthcheck on bidding and pitching to win	Not like Just me at all like me
I	We have usually developed strong relationships with the clients and potential clients who ask us to tender - BEFORE they ask us to bid.	I
2	Very few of the tenders we go for come 'out of the blue'. We are generally expecting them and have planned our team and actions in anticipation of the invitation to tender.	I
3	We have already identified, and built an understanding of, key individuals within the client or potential client before the invitation to tender arrives.	I
4	We are usually aware of ITTs before they are announced and we are already ahead of the competition in terms of client understanding, client relationships and levels of trust.	I
5	We have a clearly defined process - applied across the organisation - for deciding whether to pursue a tender opportunity or not.	I
6	The result of our evaluation process on whether to pursue a tender opportunity or not is always adhered to.	I
7	We have no hesitation in (professionally) rejecting invitations to tender where we are not in a strong position to win - and we are comfortable in turning down an opportunity to bid.	I
8	We actively select the tenders and opportunities we go for and at the same time reject those that don't meet our evaluation criteria.	1□ 2□ 3□ 4□ 5□ 6□ 7□ 8□ 9□ 10□
9	We only go for tenders that we really want to win, and that we have a reasonable likelihood of winning.	1□ 2□ 3□ 4□ 5□ 6□ 7□ 8□ 9□ 10□
10	We only go for tenders and bids that will provide us with the type of client we want, doing the type of work we like at the type of fees we expect.	1□ 2□ 3□ 4□ 5□ 6□ 7□ 8□ 9□ 10□
П	We only go for tenders in areas where we can deliver with our capability and resource.	I
12	We only go for tenders or opportunities if they fit with our business development plan and overall business strategy.	I
13	Once we have decided to pursue an opportunity there is a clearly defined process for the next stages of tendering and it is clear who is responsible for each of the key elements of this process.	I
14	Tenders and bids that are deemed viable are clearly allocated to an individual who is ultimately responsible for the co-ordination and completion of the bid - a bid leader, bid manager or bid co-ordinator.	I
15	The individual ultimately responsible for the completion of the bid communicates and agrees clear timescales and a detailed plan with those other individuals contributing to the tender.	I

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16	All individuals involved with contributing to a tender document adhere to the timescales agreed by the bid leader. These timescales allow plenty of time for review and amendment before submission.	I	10□
17	Before we put a bid together we fully understand the client's or potential client's technical requirements.	1	10□
18	Before we put a bid together we fully understand the personal agendas, preferences, fears, concerns, past experiences, politics and personal motivation of those individuals involved in the decision-making process - in addition to their logical, tangible needs.	I□ 2□ 3□ 4□ 5□ 6□ 7□ 8□ 9□	10□
19	Before we put a bid together we completely understand what the client really wants, including those key aspects that are not always (or often) expressed in the tender brief.	1□ 2□ 3□ 4□ 5□ 6□ 7□ 8□ 9□	10□
20	Time is always spent exploring those elements of a client's requirements that are more subtle and harder to find than their technical needs, this leads to us often having a fuller understanding and insight into the client or potential client than our competitors.	I□ 2□ 3□ 4□ 5□ 6□ 7□ 8□ 9□	10□
21	We always have a full understanding of which key individuals will be involved in the decision-making process for a particular opportunity.	1□ 2□ 3□ 4□ 5□ 6□ 7□ 8□ 9□	10□
22	We know the key criteria that the decision makers will have in mind as they consider our tenders/proposals.	1	10□
23	We always fully understand the scoring mechanism for a tender or bid and how a tender submission will be measured.	1	10□
24	We always know in detail, for all our tenders, the process by which the decision on which bid to choose will be made.	1	10□
25	For all our tenders we know whom we are competing against and we have considered their strengths and weaknesses.	I□ 2□ 3□ 4□ 5□ 6□ 7□ 8□ 9□	10□
26	When we are looking to win a target client we are always aware of the incumbent and understand the existing relationship the client has with them.	I□ 2□ 3□ 4□ 5□ 6□ 7□ 8□ 9□	10□
27	We always fully understand how the client's perception of us compares to that of our competitors involved in the tender.	I□ 2□ 3□ 4□ 5□ 6□ 7□ 8□ 9□	10□
28	For each tender we have agreed, communicated and demonstrated clearly how we differentiate from the competition.	1	10□
29	We have a clearly communicated and consistent best practice approach to proposal writing that everyone adheres to.	1	10□
30	All those individuals involved in writing elements of the proposal have been trained or developed in best practice proposal writing.	1□ 2□ 3□ 4□ 5□ 6□ 7□ 8□ 9□	10□

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31	Centrally there is a store or database that contains current material, such as CVs, case studies, references and standard documentation, that is relevant for commonly asked questions - such as on Health and Safety, Systems or Terms and Conditions. This store avoids much duplication of effort.	I
32	There is a professional, corporate image for our tenders/proposals that is always adhered to.	I
33	In each bid situation we always make every attempt to meet with the client or potential client before submitting our proposal.	I
34	We have always met with at least one person from the client or potential client before we submit our proposal.	I
35	We always build strong relationships and a deep understanding of the client or potential client before completing a proposal.	I
36	We very rarely go for a proposal where we are included simply to 'make up the numbers'.	1□ 2□ 3□ 4□ 5□ 6□ 7□ 8□ 9□ 10□
37	The best team is pulled together for every bid we go for. This ensures that we put forward our best possible solution to the client in the most compelling way.	I
38	All individuals involved in the bid team understand their roles and responsibilities. They never let the team down with regard to their attendance at internal bid meetings or miss internally agreed deadlines.	I
39	All those individuals involved in the bid team always work well together, support each other and share information openly.	I
40	For all bids the bid team meet, or at least communicate regularly, to review progress, share information and plan the next actions.	I
41	There is a clearly defined pricing strategy that is communicated, understood and adhered to across the firm.	I□ 2□ 3□ 4□ 5□ 6□ 7□ 8□ 9□ I0□
42	We have a strong understanding of the client's budget in every bid we go for.	1
43	Bid pricing is never an ad hoc process.	I
44	We never discount our rates to win a tender below our agreed level of margin.	1□ 2□ 3□ 4□ 5□ 6□ 7□ 8□ 9□ 10□
45	When asked to present we never leave the planning of the presentation to the eleventh hour or leave ourselves feeling pressured and under prepared.	1□ 2□ 3□ 4□ 5□ 6□ 7□ 8□ 9□ 10□
46	Our pitch presentations are always prepared with the audience in mind. They are specific to each and every client and always restate the client's unique requirements before presenting the recommendations and the benefits to the client.	I

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47	We always prepare our presentation well in advance, considering the key message(s) we want to convey, adopting a simple, effective structure for our presentation that will leave a powerful message with the client.	
48	Our pitch presentations are always rehearsed thoroughly, including planned links between presenters, timings, practice question and answer sessions and delivery.	
49	All our staff involved in pitch presentations are effective presenters and are able to deliver with real impact.	I
50	All staff that deliver presentations to clients are confident and comfortable in this role.	I
51	Everyone involved in pitch presentations has been trained, developed or coached in structuring and delivering presentations with impact, energy, enthusiasm and passion.	I
52	Our staff involved in presenting to clients really stand out from competitors with regard to their teamwork and their co-ordination and delivery of presentations.	I
53	After submitting a tender or after a pitch presentation, we always plan and implement the most appropriate form of follow-up to maintain contact with the client and maintain their levels of interest and enthusiasm.	I
54	If we are unsuccessful in winning a bid, we always explore with the client any areas that were missed or that we could have improved on.	
55	We always review our process and performance and share our learning with others on what worked well or not so well in order that we learn for future tenders.	I
56	If we were not successful, with a particular client, we always analyse and plan the next steps to strengthen the relationship or improve our chances of winning the next appropriate opportunity with this client.	I
57	We have historic records of conversion rates that are readily available and clearly understood.	I
58	When measuring our success rates we distinguish between the different types of bids we are involved in, i.e. for: extensions to existing work projects; more work of the type carried out before for this client; work never carried out previously for this client; work for a prospective client where we have built a relationship; and work for a prospective client where no relationship exists.	I
59	Tender success rates are readily accessible on a regional, divisional and firm-wide basis.	I
60	Every tender opportunity is recorded whether the bid is successful or not.	1 2 2 3 4 5 6 7 8 9 10