## PACE



## Bidding and Pitching to Win Healthcheck

| PACE Healthcheck on bidding and pitching to win |  | Not like <br> me at all |
| :--- | :--- | :--- |
| I | We have usually developed strong relationships with the clients <br> and potential clients who ask us to tender - BEFORE they ask us <br> to bid. | I $\square 2 \square 3 \square 4 \square 5 \square 6 \square 7 \square 8 \square 9 \square 10 \square$ |
| 2 | Very few of the tenders we go for come 'out of the blue'. We are <br> generally expecting them and have planned our team and actions <br> in anticipation of the invitation to tender. | I $\square 2 \square 3 \square 4 \square 5 \square 6 \square 7 \square 8 \square 9 \square 10 \square$ |
| 3 | We have already identified, and built an understanding of, key <br> individuals within the client or potential client before the invitation <br> to tender arrives. | I $\square 2 \square 3 \square 4 \square 5 \square 6 \square 7 \square 8 \square 9 \square 10 \square$ |
| 4 | We are usually aware of ITTs before they are announced and we <br> are already ahead of the competition in terms of client <br> understanding, client relationships and levels of trust. | I |


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| 16 | All individuals involved with contributing to a tender document <br> adhere to the timescales agreed by the bid leader. These <br> timescales allow plenty of time for review and amendment before <br> submission. | I $\square 2 \square 3 \square 4 \square 5 \square 6 \square 7 \square 8 \square 9 \square 10 \square$ |
| 17 | Before we put a bid together we fully understand the client's or <br> potential client's technical requirements. | $1 \square 2 \square 3 \square 4 \square 5 \square 6 \square 7 \square 8 \square 9 \square 10 \square$ |
| 18 | Before we put a bid together we fully understand the personal <br> agendas, preferences, fears, concerns, past experiences, politics <br> and personal motivation of those individuals involved in the <br> decision-making process - in addition to their logical, tangible <br> needs. | I |


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| 31 | Centrally there is a store or database that contains current material, such as CV s, 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. | $1 \square 2 \square 3 \square 4 \square 5 \square 6 \square 7 \square 8 \square 9 \square 10 \square$ |
| 32 | There is a professional, corporate image for our tenders/proposals that is always adhered to. | $1 \square 2 \square 3 \square 4 \square 5 \square 6 \square 7 \square 8 \square 9 \square 10 \square$ |
| 33 | In each bid situation we always make every attempt to meet with the client or potential client before submitting our proposal. | $1 \square 2 \square 3 \square 4 \square 5 \square 6 \square 7 \square 8 \square 9 \square 10 \square$ |
| 34 | We have always met with at least one person from the client or potential client before we submit our proposal. | $1 \square 2 \square 3 \square 4 \square 5 \square 6 \square 7 \square 8 \square 9 \square 10 \square$ |
| 35 | We always build strong relationships and a deep understanding of the client or potential client before completing a proposal. | $1 \square 2 \square 3 \square 4 \square 5 \square 6 \square 7 \square 8 \square 9 \square 10 \square$ |
| 36 | We very rarely go for a proposal where we are included simply to 'make up the numbers'. | $1 \square 2 \square 3 \square 4 \square 5 \square 6 \square 7 \square 8 \square 9 \square 10 \square$ |
| 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. | $1 \square 2 \square 3 \square 4 \square 5 \square 6 \square 7 \square 8 \square 9 \square 10 \square$ |
| 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. | $1 \square 2 \square 3 \square 4 \square 5 \square 6 \square 7 \square 8 \square 9 \square 10 \square$ |
| 39 | All those individuals involved in the bid team always work well together, support each other and share information openly. | $1 \square 2 \square 3 \square 4 \square 5 \square 6 \square 7 \square 8 \square 9 \square 10 \square$ |
| 40 | For all bids the bid team meet, or at least communicate regularly, to review progress, share information and plan the next actions. | $1 \square 2 \square 3 \square 4 \square 5 \square 6 \square 7 \square 8 \square 9 \square 10 \square$ |
| 41 | There is a clearly defined pricing strategy that is communicated, understood and adhered to across the firm. | $1 \square 2 \square 3 \square 4 \square 5 \square 6 \square 7 \square 8 \square 9 \square 10 \square$ |
| 42 | We have a strong understanding of the client's budget in every bid we go for. | $1 \square 2 \square 3 \square 4 \square 5 \square 6 \square 7 \square 8 \square 9 \square 10 \square$ |
| 43 | Bid pricing is never an ad hoc process. | $1 \square 2 \square 3 \square 4 \square 5 \square 6 \square 7 \square 8 \square 9 \square 10 \square$ |
| 44 | We never discount our rates to win a tender below our agreed level of margin. | $1 \square 2 \square 3 \square 4 \square 5 \square 6 \square 7 \square 8 \square 9 \square 10 \square$ |
| 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. | $1 \square 2 \square 3 \square 4 \square 5 \square 6 \square 7 \square 8 \square 9 \square 10 \square$ |
| 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. | $1 \square 2 \square 3 \square 4 \square 5 \square 6 \square 7 \square 8 \square 9 \square 10 \square$ |


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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. | 1 $\square 2 \square 3 \square 4 \square 5 \square 6 \square 7 \square 8 \square 9 \square 10 \square$ |
| 48 | Our pitch presentations are always rehearsed thoroughly, including planned links between presenters, timings, practice question and answer sessions and delivery. | $1 \square 2 \square 3 \square 4 \square 5 \square 6 \square 7 \square 8 \square 9 \square 10 \square$ |
| 49 | All our staff involved in pitch presentations are effective presenters and are able to deliver with real impact. | $1 \square 2 \square 3 \square 4 \square 5 \square 6 \square 7 \square 8 \square 9 \square 10 \square$ |
| 50 | All staff that deliver presentations to clients are confident and comfortable in this role. | $1 \square 2 \square 3 \square 4 \square 5 \square 6 \square 7 \square 8 \square 9 \square 10 \square$ |
| 51 | Everyone involved in pitch presentations has been trained, developed or coached in structuring and delivering presentations with impact, energy, enthusiasm and passion. | $1 \square 2 \square 3 \square 4 \square 5 \square 6 \square 7 \square 8 \square 9 \square 10 \square$ |
| 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. | $1 \square 2 \square 3 \square 4 \square 5 \square 6 \square 7 \square 8 \square 9 \square 10 \square$ |
| 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. | $1 \square 2 \square 3 \square 4 \square 5 \square 6 \square 7 \square 8 \square 9 \square 10 \square$ |
| 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. | $1 \square 2 \square 3 \square 4 \square 5 \square 6 \square 7 \square 8 \square 9 \square 10 \square$ |
| 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. | $1 \square 2 \square 3 \square 4 \square 5 \square 6 \square 7 \square 8 \square 9 \square 10 \square$ |
| 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. | $1 \square 2 \square 3 \square 4 \square 5 \square 6 \square 7 \square 8 \square 9 \square 10 \square$ |
| 57 | We have historic records of conversion rates that are readily available and clearly understood. | $1 \square 2 \square 3 \square 4 \square 5 \square 6 \square 7 \square 8 \square 9 \square 10 \square$ |
| 58 | When measuring our success rates we distinguish between the different types of bids we are involved in, i.e. for: <br> - extensions to existing work projects; <br> - more work of the type carried out before for this client; <br> - work never carried out previously for this client; <br> - work for a prospective client where we have built a relationship; and <br> - work for a prospective client where no relationship exists. | $1 \square 2 \square 3 \square 4 \square 5 \square 6 \square 7 \square 8 \square 9 \square 10 \square$ |
| 59 | Tender success rates are readily accessible on a regional, divisional and firm-wide basis. | $1 \square 2 \square 3 \square 4 \square 5 \square 6 \square 7 \square 8 \square 9 \square 10 \square$ |
| 60 | Every tender opportunity is recorded whether the bid is successful or not. | $1 \square 2 \square 3 \square 4 \square 5 \square 6 \square 7 \square 8 \square 9 \square 10 \square$ |

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