



LESSON #4

DO AS MUCH AS YOU CAN, AS EARLY AS YOU CAN

Your ability to convert an opportunity into an engagement will be based on knowing everything possible about your client, the opportunity and the competition. But once documentation is released, your ability to engage with the client will be limited by probity processes, so get to work early gathering information from the client and influencing the client's opinion of you.

GET BUSY GATHERING INFORMATION



NETWORKING

Make connections and build relationships with the client and stakeholder organisations



MEETINGS

Meet with your contacts to gather intel and deepen your understanding of their needs and expectations



PHONE CALLS

Reach out to stay connected, confirm processes and timing and gather insights



ANNUAL REPORTS

Review formal publications to understand their mission, priorities, risks and challenges



INDUSTRY PUBLICATIONS

Review industry publications to understand the competitive landscape and sector issues



MARKET RESEARCH

Commission research in to the end user expectations such as current experience and desired state

PREPARE WHAT YOU CAN IN ADVANCE



PROJECT SHEETS

Decide your likely reference projects and gather information on dates, values, scope, outcomes, awards, team etc



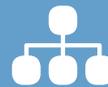
CASE STUDIES

Decide which case studies will support your proposal and prepare detailed and relevant lessons learnt reflections



CVS

Prepare detailed CVs for each team member, emphasising why their past experience relates to their future responsibilities



ORG CHARTS

Decide your likely team structure and nominate candidates for all key roles – don't underestimate the time this takes!



TESTIMONIALS

Gather testimonials and confirm referees – probity may prevent you from doing this later



BRANDING

Consider creating a unique brand for the bid, designed to set the right first impression with the client



TEMPLATES

Create a suite of Microsoft Word templates that reflect your bid branding



TEAM PHOTOS

Take professional photos of your proposed team members – this is much more important than you might realise



PROJECT PHOTOS

Gather photos of your reference projects and commission artist impressions of your proposed solution



STATISTICS

Gather up-to-date relevant statistics and metrics to support your proposal