



TENDERS | BIDS | PROPOSALS | SUBMISSIONS

# HOW TO WIN

## 10 LESSONS LEARNT FROM MAJOR BIDS



# TENDERS BIDS PROPOSALS SUBMISSIONS

Whatever word you use, it means 'hard work', 'long hours' and 'tight deadlines'.

This is the world we live in. If this is your world too, we can help.

Aurora Marketing has developed a niche in submission management, having worked on countless tenders and bids in defence, infrastructure, engineering, construction, manufacturing, professional services, corporate services and a range of other industries.

We're a special forces team of strategists, communicators, designers, project managers and marketers, backed by a proprietary system for submission management which guarantees we pitch the best possible bid and get you over the line.

**Aurora Marketing's 10 Lessons Learnt from Major Bids** shares some of our experience to give you the winning edge.

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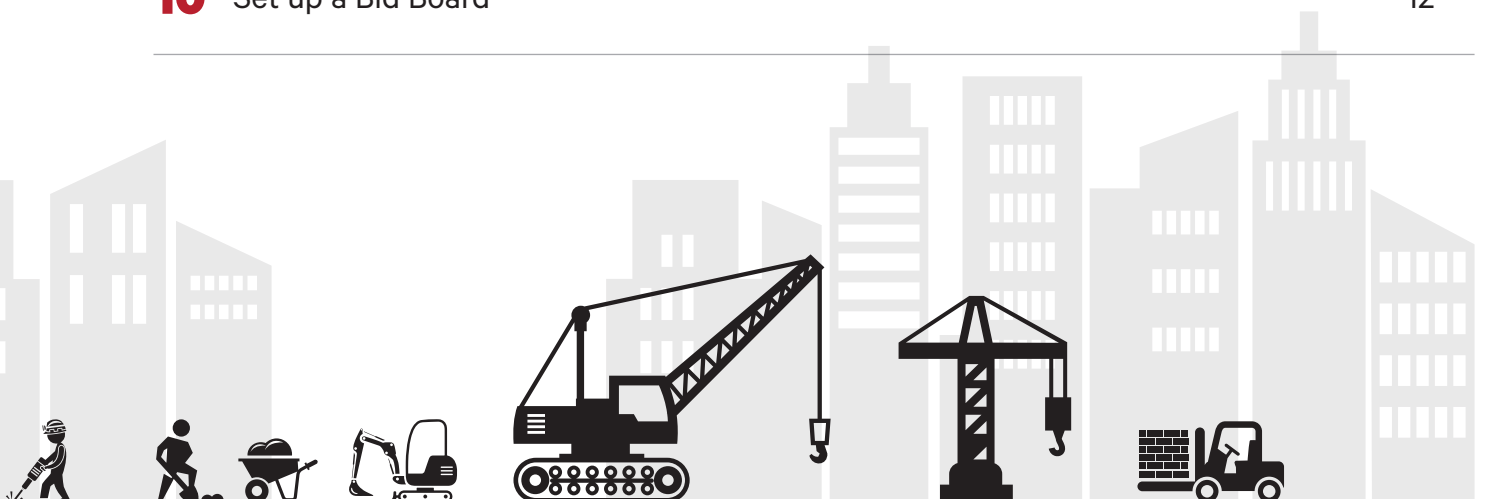
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# 10 LESSONS LEARNT FROM MAJOR BIDS

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# BE BRUTALLY SELECTIVE ABOUT WHICH BIDS YOU PURSUE

The key to winning tenders is to select the right tenders for your organisation to pursue. It is better to invest your time in winning one tender than in bidding for several.

Our 5-part, 25-question Go/No Go analysis can help you decide which bids you should target.

## STEP 01

### Develop a clear Go / No Go checklist

As a starting point, feel free to adapt our Go / No Go checklist below. Delete any questions that don't seem relevant to your situation, add additional questions if appropriate, decide what your 'pass' mark is and decide if any of the questions are 'deal breakers'.

## STEP 02

### Use the checklist to assess your opportunities

Assess each opportunity against your new criteria. If you have set your 'pass' mark and identified your 'deal breakers' correctly, you will weed out the long-shots and time wasters so you can focus on the opportunities that matter.

## STEP 03

### Revisit throughout the bid period

Things can change over the course of a pursuit, so it is a good discipline to revisit the Go / No Go decision at key milestones to confirm your decision. If things change, it might be appropriate to withdraw from a bid that you had previously decided was a 'Go'.

### EXPERTISE & CLIENT RELATIONSHIP

- 1 Do you know – and respect – the client?
- 2 Does the client know – and respect – you?
- 3 Do you have impressive relevant experience?
- 4 Do you have credibility in this field?
- 5 Do you have anything genuinely different to offer?

### STRATEGIC VALUE

- 6 Is this the right strategic direction for you?
- 7 Would winning this contract further your goals?
- 8 Is this client likely to be a strong partner in future?
- 9 Do the benefits outweigh the risks?
- 10 Do you have the capability to deliver this contract?

### COMPETITIVE LANDSCAPE

- 11 Is there an incumbent?
- 12 Is the client happy with the incumbent's performance?
- 13 If the client is unhappy, do you know why?
- 14 Is the scope of requirements slanted toward a competitor?
- 15 If you win, will it unsettle or damage your competitors?

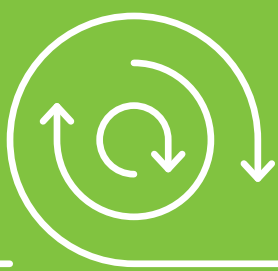
### BID CERTAINTY

- 16 Is this project or acquisition properly funded?
- 17 Is the client serious about making a decision?
- 18 Are there benefits to the client in choosing us?
- 19 Are there political considerations to be aware of?
- 20 Will costs be reimbursed if the project doesn't proceed?

### CORPORATE COMMITMENT

- 21 Do you have full corporate support and approval?
- 22 Do you have the depth of commitment to this tender? (resources, budget)
- 23 Is your organisation comfortable with the contractual requirements?
- 24 Is the project commercially viable?
- 25 Have you already formed the partnerships you need?

**HOT TIP:**  
You can also use the Go / No Go checklist to identify your weaknesses so you can focus on strengthening your offer.





# UNDERSTAND THE FORMULA FOR WINNING

Once you've decided to pursue a bid, it helps to know where to focus your efforts.

## IN OUR EXPERIENCE, EVERY WINNING TENDER HAS THESE 5 ELEMENTS:

1

### TEAM

The right team, appropriately structured, with the right people to successfully deliver the work.



2

### TRACK RECORD

A demonstrated track record of delivering the kind of results the client wants to achieve.



3

### RELATIONSHIP WITH CLIENT

Knowledge of the client, including their vision, objectives, priorities, concerns, challenges and risks. It also helps if the client has knowledge of you and your capabilities.



4

### COMMITMENT TO BID

A dedicated bid team willing to do the work necessary to develop a winning bid.



5

### OUTSTANDING APPROACH/SOLUTION

An approach or solution that the client will value more than any other.



Of these 5 elements, **team, track record, relationship with the client** and **commitment to bid** are mandatory – they will get you in the race but will not get you over the line. For example, your track record may include having built more bridges than any other company in the world, but this won't be enough to win the tender to build another bridge.

The 5<sup>th</sup> element, an **outstanding approach or solution**, is the key. You must be able to develop an outstanding approach or solution for **this project** for **this client**, and that is what will win you the tender. The other 4 elements give you the knowledge and expertise to develop the winning approach or solution.

Importantly, you may notice that price is not considered an element. From our observations, price is part of the approach or solution element. For instance, it may be that the lowest price is the approach or solution you adopt. We generally caution against this strategy though and work with teams to develop a more sustainable and broader tender strategy.

## ARTICULATING THE WINNING APPROACH/SOLUTION

If the stars align and the creative juice flows, teams can articulate a powerhouse win strategy in a matter of hours. If not, it might take several weeks. The key is how many of the elements you have and in what abundance.

The important thing is to be able to articulate a compelling, persuasive argument to the evaluation panel. The message needs to be short, sharp, exciting, assuring and meaningful. Phrases like 'certainty of delivery', 'safe pair of hands' and 'value for money' will not cut through.



## GET INTO THE BID MINDSET

Most tender teams approach a tender as if it is a test: they believe that if they just provide a clear, concise and technically-correct answer for each question they'll succeed. Some of the more experienced tenderers even follow the KISS Principle: Keep It Short and Sweet.

The problem with this approach is that **everyone can pass a test but only one can win a tender**. This means that a tender is not a test - it's a competition!



To win the competition, you have to go much further than clear, concise, comprehensive and technically-correct answers. You need to take the content to the next level where it is compelling, persuasive and competitive. You need to score better than the competition on as many elements as possible and become the client's preference across a whole range of criteria.

Once a bid team grasps this reality, they embrace the bid mindset. From that point forward, the team digs deeper, works harder and pushes themselves further in order to win. They start to talk about **'going beyond business as usual'** and **'taking it to the next level'**.

**TO TELL IF YOUR TEAM HAS A TEST MINDSET OR A BID MINDSET, LISTEN TO THEIR LANGUAGE WHEN THEY TALK ABOUT PREPARING THE SUBMISSION**

### Red flags

- ✗ "Just answer the question"
- ✗ "This is a compliance question"
- ✗ "Tick the box"
- ✗ "That's good enough"



### Green Lights

- ✓ "How do we go beyond business as usual?"
- ✓ "How do we win the competition?"
- ✓ "What more will the client want to know?"
- ✓ "How do we demonstrate...?"



“ When you're putting a tender together, you need a strong team of diverse-thinking people and a willingness to take the blinkers off. You need to be certain that you're addressing everything that the customer needs, but at the same time thinking about what else you can offer them that is above and beyond – what is it that your competitors may not be offering...”

- **Danny Broad, Chairman of Australasian Rail Association**

”

## 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


# ESTABLISH YOUR PARTNERSHIPS AS EARLY AS POSSIBLE

Teaming with other businesses can help you fill competency gaps and increase your probability of winning. Importantly, any partnerships should be fully formed before a bid kicks off, otherwise you'll waste valuable bid time on partnership negotiation.

## WHEN FORMING YOUR PARTNERSHIPS, CONSIDER THE FOLLOWING:


**STEP 01**

**Choose carefully**  
A partnership is like a marriage - don't enter in to it lightly. Look for partners who will strengthen your offer and provide an expertise or product that you don't have and can't develop. Ensure you are aligned on vision, values, commitment, delivery approach and risk appetite. And ideally, look for a partner that you see broader potential to work with than just one bid.




**STEP 02**

**Decide your structure**  
Agree what the structure of the partnership will be, as well as the scope split, roles, cost sharing arrangements, expectations for investment and resourcing and so forth. Ideally, the partnership structure will reinforce your competitive advantage and be simple for the client to understand.




**STEP 03**

**Tighten your alignment**  
Hopefully you selected a partner that was already on the same page as you for vision, values, commitment, delivery approach and risk appetite. Now, you need to start becoming a team. Engage a teaming coach, set up a shared office to enhance communication and collaboration, create opportunities to get to know each other on a personal level, and deepen your understanding of each other's objectives.




**STEP 04**

**Document the deal**  
The next step is to prepare the documentation to formalise the partnership. It is important to do this before the bid kicks off, and ideally even execute the agreements, to avoid the temptation to renegotiate the deal during the bid phase.



**STEP 05**

**Get to work**  
Every team evolves through the phases of forming, storming, norming and performing, and of course the ideal situation is for your team to be performing during the bid phase. This means you need to progress through the previous 3 phases which can only be achieved by working together.



“ The selection of bidding partners is crucial. And importantly, each company must have a clear understanding of what each other's level of governance and risk appetite will be. Partnering takes time, willingness and intimacy, and when partnerships aren't well formed before the bid period starts, it is very difficult to succeed.

- Andy Spink, Executive General Manager - Downer Group

”





LESSON  
#6

## WRITE COMPELLING AND PERSUASIVE CONTENT

Your formal submission is the only way the client can assess then select you. For this reason, you need to make sure that your submission presents a compelling case as to why you should win this tender.

We have developed the following model and 8 crucial elements to ensure that **every deliverable** that you develop has strong, convincing technical content that transforms into a compelling, persuasive submission that makes the client want YOUR solution.

<b>Structure</b>	Ensure your response matches the client's request. Include all of the elements requested, in the precise order that the client specifies, and meet any page or word limits.	<b>15%</b>
<b>Comprehensiveness</b>	Provide the level of technical detail that the client expects, without boring them with irrelevant detail. Depth of information provides confidence.	<b>25%</b>

**Together, these 2 elements give you the basic 'test' answer. Most people stop here, but this is the starting point, not the finishing point.**

<b>Project Objectives</b>	Demonstrate that you understand the client's big picture and that your solution will meet, or exceed, their expectations.	<b>10%</b>
<b>Risks and Challenges</b>	Demonstrate that you understand what keeps the client awake at night and how your solution resolves or mitigates those risks and challenges.	<b>10%</b>
<b>Evidence</b>	Include evidence and proof points of your past successes, such as numbers, facts, details, diagrams, photos, testimonials, case studies, project sheets, statistics...	<b>10%</b>

**When you've added these 3 elements, you've developed a robust and detailed technical response. The client feels confident in your approach and believes you can provide a good outcome for them.**

<b>Unique Approach</b>	Show that your solution is unique to the client. This is the most crucial – and most difficult – of the 8 elements.	<b>10%</b>
<b>Competitive Edge</b>	Speak in the client's language, put them at the centre of your answer, emphasise your strengths, mitigate your weaknesses and ghost your competition.	<b>10%</b>
<b>Win Themes</b>	Weave your tender strategy and key messages throughout every deliverable to create a cohesive strategic narrative.	<b>10%</b>

**When you've added these final 3 elements, you've transformed your technical response into a compelling and persuasive proposal. Now the client sees your solution as their preferred solution.**

LESSON  
#7

# AVOID TSUNAMI SEASON WITH SMART LOAD LEVELLING

If all the deliverables are due at the same time, it leads to a tsunami for all of the people involved at each milestone. Load levelling evens out the workload which reduces stress and also improves the quality of work.

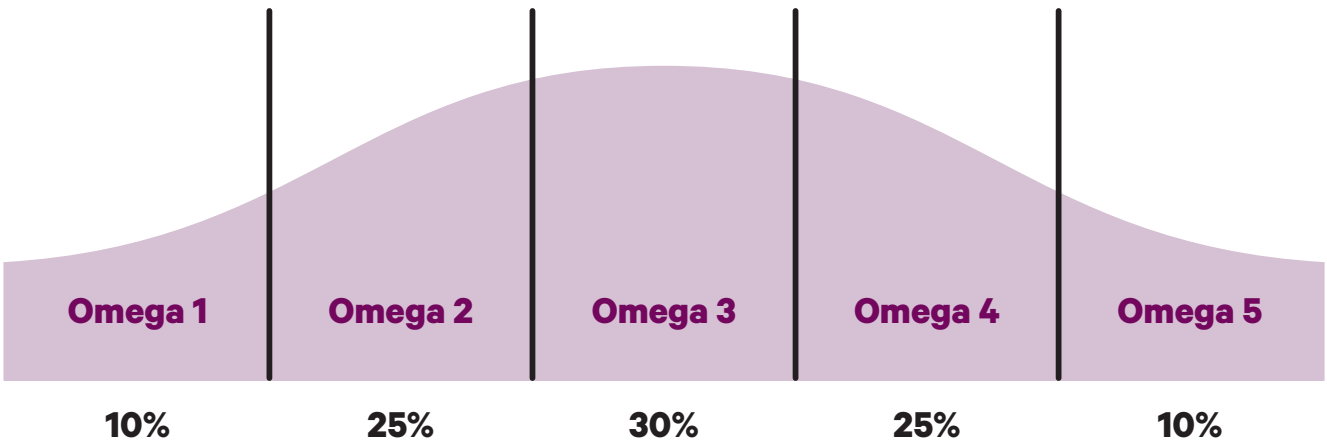
Depending on the number of deliverables and the duration of your bid period, you might want to assign your deliverables into 3 or 5 categories. As an example, 3 categories might mean some deliverables are finished a month before the deadline, most 2 weeks before the deadline and the rest in the final days before the deadline.

You can group deliverables based on their complexity, their sign-off requirements, their dependencies or even on team availability.

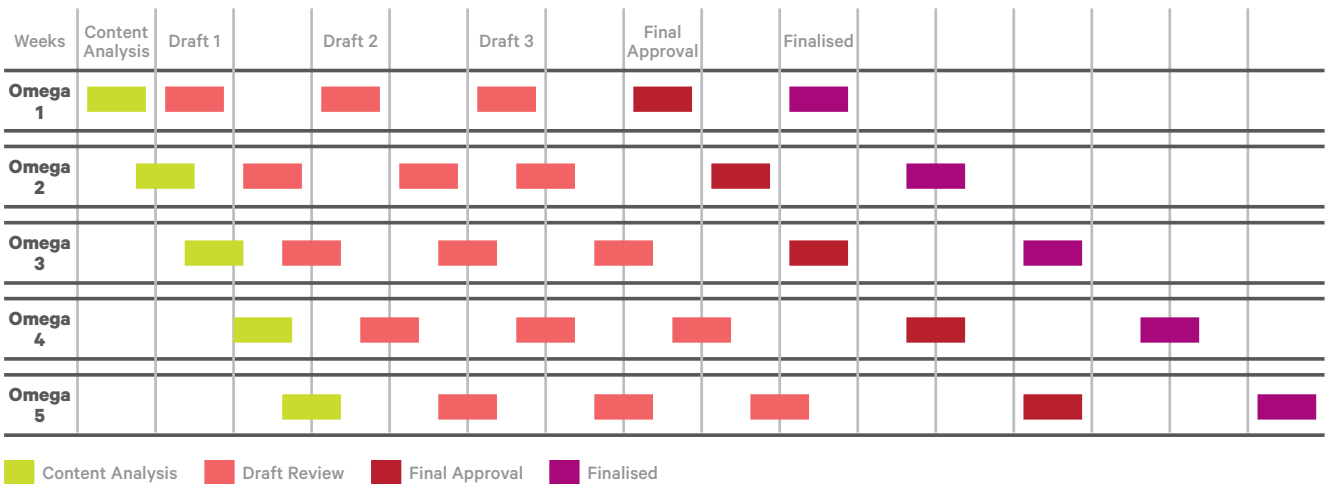
Mapping this out against your bid program, you get a bell curve of activity instead of an enormous amount of work required in one period.

Because we're cool, we've called these categories Omega categories.

## LOAD LEVELLING EVENS OUT THE WORKLOAD



## SAMPLE MILESTONES



# ASSEMBLE COMMITTED AND ENGAGED REVIEW TEAMS

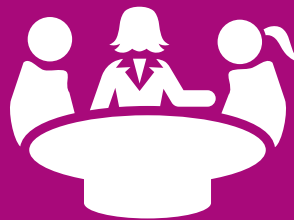
With a large number of deliverables, it is unrealistic for any person to review all of the documents in any meaningful depth. By splitting the review load to Review Teams, we create a more manageable load so that each reviewer can properly review the documents and provide meaningful feedback in a timely manner.

Our recommendation is that each Review Team has a number of senior and experienced experts across a range of relevant subject areas, drawn from a cross-section of the organisation and advisory team.

Furthermore, each Review Team should be led by an experienced facilitator with extensive bidding expertise, and each Review Team should 'own' a full package of content, such as the technical solution, the commercial and risk content, or the management plans. The Review Teams should actively participate in every step of the content development process, from Content Analysis through each of the draft Review Sessions, and ultimately through to the finalisation of the document.

## WHAT REVIEW TEAMS DO:

- ✓ They use their expertise to challenge, direct and coach the leads and writers of each section to help make each section the very best it can be
- ✓ They provide a sounding board and help brainstorm innovations, initiatives and ideas so that we can create a unique, high-value offer for the client
- ✓ They provide a sanity check for the proposal to ensure it makes sense and is correct
- ✓ They ensure consistency and synergy between the schedules
- ✓ They provide the strategic insight to ensure the proposal is differentiated and compelling to the client
- ✓ They use their expertise to check the quality and accuracy of the content
- ✓ They objectively score each document to provide a measure of a document's progress and development
- ✓ They approve the content to enter the sign-off process



**Review Teams are instrumental in helping put together a winning bid. They allow us to harness the intellectual horsepower of an incredible team to create a winning solution.**



## SEAGULLS

By engaging the Review Team in the full process of content development from the beginning, we get the right direction at the right time. No one likes investing months of work to have a seagull swoop in at the end and do what seagulls do.

# CONDUCT EARLY AND THOROUGH CONTENT ANALYSIS

One of the most crucial steps in any submission is what we call 'Content Analysis'.

This is where the bid team conducts a **3-way diagnostic**:



Like many things in bidding (and life), Content Analysis is a “garbage in - garbage out” activity. When done well, the team benefits from a deep understanding of how to win and a clear path forward for making it happen. When done poorly, the team wastes time, misses a crucial opportunity and undermines their likelihood of winning.

The best results are obtained from Content Analysis workshops which are conducted with a **small group of subject matter experts** who can contribute to a constructive discussion on the client, the subject matter and the likely solution. Importantly, these workshops should be **held as early as practical** in the bid phase, ideally within the first few days after the bid documents are released. Remember, a core part of the diagnostic is to understand the client, so it makes sense to do this as early as possible and certainly before the team starts working on their solution.

**Content analysis is one of the most crucial activities in the bid.**  
**Don't cut corners on this step!**



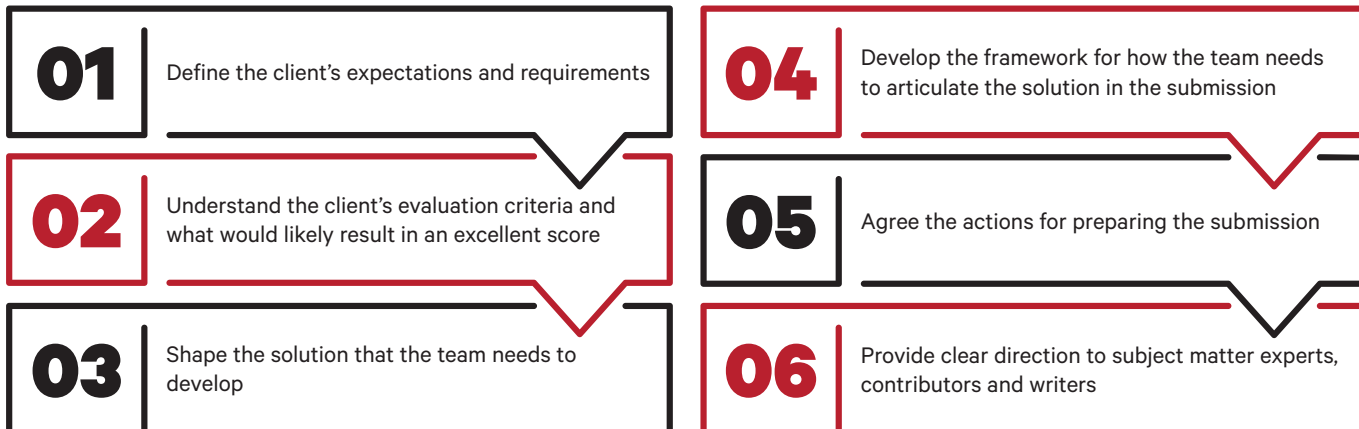
## LET'S TALK LESSONS LEARNT. OUR FORMAL RESEARCH REVEALED:

- A large portion of submissions do not contain the requested information.
- 82% of written explanations aren't clear or are lacking detail.
- When bidders provide a business-as-usual response, at best they score 5/10.

**Content analysis solves these problems...**



## THE SPECIFIC OUTCOMES WE STRIVE TO ACHIEVE ARE:





Our methodology provides a structured framework for the team to think broadly, deeply and creatively about each deliverable. We can adapt our sessions to finetune what we need to focus on, how we facilitate each session and how long each session takes, but in our experience the following discussion structure works really well.

#### TYPICAL CONTENT ANALYSIS AGENDA

TOPIC	ANALYSIS
<b>1. CLIENT ANALYSIS</b>	<ul style="list-style-type: none"><li>▪ What is the client asking, why, what is important to them, etc?</li><li>▪ What is the specific scope, what are the specific requirements, why, how are the requirements prioritised, etc?</li><li>▪ What are the evaluation criteria, how are they prioritised, etc?</li></ul>
<b>2. SOLUTION SHAPING</b>	<ul style="list-style-type: none"><li>▪ What would be the ideal solution for the client, how would this be unique, how will this provide value, etc?</li></ul>
<b>3. SUBMISSION PLANNING</b>	<ul style="list-style-type: none"><li>▪ <b>Deliverable overview</b> – What are the basic details about the deliverable including weighting, page limits, etc?</li><li>▪ <b>Structure</b> – What is the client's structure, what attachments are required, etc?</li><li>▪ <b>Comprehensiveness</b> – How will we articulate our solution, what are the benefits of our approach, what level of detail is required, etc?</li><li>▪ <b>Project Objectives</b> – How will we explicitly contribute to achieving the project objectives or client vision, etc?</li><li>▪ <b>Risks and Challenges</b> – Do we understand the major risks and challenges of this aspect of the project, how will we minimise and manage them for the client, etc?</li><li>▪ <b>Evidence</b> – What evidence do we have to build credibility and demonstrate the certainty of our solution, etc?</li><li>▪ <b>Unique Approach</b> – What is unique about our solution, what can we offer that is innovative, how have we gone beyond business as usual, etc?</li><li>▪ <b>Competitive Edge</b> – How do we position ourselves against our competition, what are our strengths, what are their weaknesses, etc?</li><li>▪ <b>Win Themes</b> – How do we connect to the overall strategic narrative, etc?</li></ul>
<b>4. ACTIONS</b>	<ul style="list-style-type: none"><li>▪ Who is responsible, what needs to happen, when does it need to happen by, etc?</li></ul>

In our experience, Content Analysis is the step in the bidding process that teams dislike the most. After all, it's hard work and they usually want to get stuck in to developing the solution, not workshopping boring stuff like client expectations. We get it! You've got lots of stuff to do, every minute is crucial and being stuck in meetings seems like an epic waste of time. But we know from bitter experience that cutting corners in this area leads to major problems down the track. In the worst case scenario, teams shortcut their Content Analysis and end up misreading client requirements, underestimating their expectations, developing unacceptable solutions, submitting nonconforming submissions, or just generally submitting unconvincing or lacklustre proposals.

#### WHAT TEAMS SAY WHEN THEY WANT TO JUSTIFY CUTTING CORNERS

"It's too early! We need to develop the solution first."

"This returnable is a tick-a-box compliance returnable (eg management plan / finance schedule / departures table / spreadsheet) so it only needs a light touch."

"There's not enough time." / "It's a waste of time."

#### WHAT TEAMS DO WHEN THEY WANT TO WIN

They do Content Analysis as early as possible so that all of their work is informed by a deeper understanding of the client.

They start by assuming that every schedule is important, and use the Content Analysis process to critically analyse each schedule to determine the appropriate level of priority and effort.

They willingly invest time in areas which directly affect the likelihood of winning, such as developing an understanding of the client, shaping a solution to match the client's expectations and requirements, and ensuring the submission is persuasive and compelling to the client.



LESSON  
#10

# SET UP A BID BOARD

When you reach the pointy end of a bid, all the months of work are finally coming to fruition. The stakes are high. It's an exciting time. But the team is also tired and feeling stretched. For this reason, you need a robust finalisation process.

We like to set up a visual tracking system, sometimes called a **bid board** or a **status wall**. It needs to be accessible to the whole team so they can gather around, update each other on progress and tackle any issues. The bid board can be as simple as a whiteboard or a plain wall.

- ✓ **Creates a sense of intensity and urgency**
- ✓ **Single source of truth**
- ✓ **Keeps the team focused**
- ✓ **Drives action with clear accountability**



## SETTING UP A BID BOARD

Create a column for each step in the process and an individual strip for each deliverable. At a glance, the team can see where the work is within the process. And if you've used a 'Traffic Light' system, it is easy to see which deliverables require urgent attention or significant effort to finalise.

GOLD REVIEW	PENS DOWN	PRODUCTION 1	APPROVAL	PRODUCTION 2	SSO SIGN OFF	FINAL PRODUCTION
<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>
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## A SQUEEZY PIG NAMED KEVIN

Invest in a squeeze toy as the call to attention for the team to assemble. We find it is a fun and lighthearted way to get the team engaged and boost morale.

When it's time for the whole team to convene at the bid board, squeeze Kevin (or your preferred name and animal) to assemble the troops. It's hard to be stressed or grumpy when a squeeze pig is involved!







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