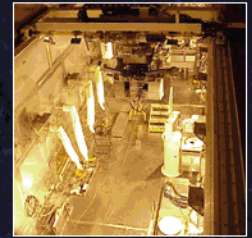
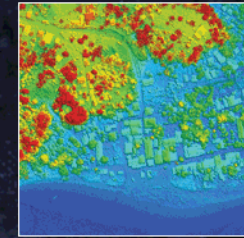




The Perfect Pitch Proposals that get Results



MERRICK & COMPANY

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Engineering | Architecture | Design-Build | Surveying | GeoSpatial Solutions



Introduction

Too much money is wasted on the bidding process

Treating the process like a project; understanding the goal, allocating resources, focusing effort, monitoring schedule and budget provides the best and most cost effective solution

The Bid/No Bid Process

- Starts as a decision to enter a market or increase market share
- A prospect is identified –the “Lead”
- Leads are discarded or developed
- Decision made on continuing to RFQ stage
- Involves focused information gathering to aid decisions
- Go/No Go evaluations (Gates) along the way
- Ends with the decision to bid/no bid

Example of Gates

Date:	Updated:								
Client:				GATE 1 Lead		GATE 2 Pursuit		GATE 3 Proposal	
Prospect:									
BU:									
Salesperson:									
Pointperson:									
CLIENT INFO									
Client Type:				<input type="checkbox"/> New		<input checked="" type="checkbox"/> Existing			
Client's Team Roles:		c=coach, td-tech decider, ta=tech adviser, fa-financial advisor, fd=financial decider							
Influence/Weight:		H=high, M=medium, L=low							
Name & Title	Location	Role	Weight	Lead	Key Intelligence				
Client's Project Drivers:									
Client's Financial Status				<input type="checkbox"/> N/A <input checked="" type="checkbox"/> ??		<input type="checkbox"/> N/A <input checked="" type="checkbox"/> ??		<input type="checkbox"/> N/A <input checked="" type="checkbox"/> ??	
				<input type="checkbox"/> OK		<input type="checkbox"/> OK		<input type="checkbox"/> OK	
Financial Analysis (D&B?)						<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	

Key Categories

- Customer Information
- Market Information
- Bid Information
- Our Information

Decision Template

- **Customer Information (Do we really know the customer?)**

- 1. How well do we know how they conduct their business? _____
- 2. Do we know the technical decision makers? _____
- 3. How well do we know them? _____
- 4. Do we know the commercial decision makers? _____
- 5. How well do we know them? _____
- 6. Do we know who is ultimately going to OK the recommended bid? _____
- 7. Are we all in agreement that we know what they want? _____

- **Market Information**

- 8. How well do we know the business they are in? _____
- 9. How well are we known in the business? _____

- **Bid Information**

- 10. Do we know how many competitors are bidding, and who are they? _____
- 11. Do we have enough time to get our proposal ready? _____
- 12. Is the project approved and funded? _____

- **Our Information**

- 13. Do we have the resources for the job? _____
- 14. Do we have the resources to do the proposal? _____
- 15. Can we accept the contract Terms and Conditions? _____

TOTAL _____

Score Scale: 1-5
1 = Don't really know/No
5 = Really know/Yes

Max Possible Points =75
Comfort Level = 50-55
<40 Why bid? Get more info Quickly !



Proposal Do's

- Focus on what the customer wants
- Keep your proposal simple, short and to the point
- Run the proposal like a project
- Pay attention to the proposal budget, scope and schedule
- Make people's resumes relevant
- Make sure examples of relevant experience are recent
- Ask people's permission before using them as a reference
- Involve partners/subcontractors/other offices as early as possible
- Involve your company's management early and throughout the proposal
- Make sure your price and rates account for escalation
- Allow enough time for:
 - Your company's approvals process
 - A once-through review of the complete proposal
 - Typing, revisions and binding
- Have a back-up plan for all electronic material
- Be open-minded. Accept people's ideas and criticisms

Proposal Don'ts

- Assume you know what the customer wants
- Put in lots of boiler plate
- Send company manuals
- Show large complicated organization charts
- Put in long resumes
- Use abbreviated terms
- Spend too much time filling out questionnaires
- Choose complicated formats or styles
- You will not have the time
- Forget all the “non-technical” parts you need to answer