



# TRACK CHANGES

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QUARTERLY REVIEW

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# APMP UK CEO FOREWORD

Welcome to APMP UK's Track Changes. In this edition our focus is on "Conversations across a divide". There are many differences in the bid and proposal world; those working in corporate companies vs freelancers; third sector vs not; Gen Z vs Gen X; people working in different industries, different roles, or coming from different backgrounds.

Some of us work on bids and proposals in one specific industry, some of us work across more/all industries, some work on huge bids with deadlines of over six months, while some of us work on bids with a two-week turnaround. Add to that the 420 different job title variations that have come to light in the 2022 UK Bid and Proposal Salary Survey conducted by Bid Solutions, and you can see that we are part of a very diverse and wide-reaching profession with lots of different experiences! So, we saw an opportunity for some myth busting and education in this theme.

My 20 years of experience has included being the small bid team of one, to being bid manager of a large corporate team, as well as working on bids with a week turnaround, to large bids with an 18-month turnaround. I've gone from working in small companies, to large corporates, to being a consultant; from working in one specific industry to working across many and working on public sector bids as well as private sector bids. I think the variety and wide scope of our profession is why I'm still here after 20 years. It's always interesting, it's always varied, and there is always something to learn whether you are new to the profession, or an old timer like me.



We all have different experiences of bids and proposals we work on, and that's the beauty of it. We can all learn from each other. And that's why I'm so excited that the APMP UK 2022 Conference is being held face-to-face this year.

To be able to attend sessions by people who have different experiences from me to networking with people and finding common ground in the proposal space, to imparting advice to newer members

of the profession, it's a great place to find and learn from our differences within the bid and proposal profession.

Read all about the conference and book your tickets [here](#).

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# FROM THE DESK OF OUR CMO

The articles you are about to read provide a wide-ranging set of views, opinions and experiences comparing large bids with small ones. You'll read about bid managers described as zebras and whether they are black with white stripes or white with black stripes, an analogy of the different flavours of bidding, and how we must often adapt what we are to fit the bid.

You'll hear from someone with over 40 years in bidding who has seen bidding evolve from the typing pools of the 1980s to the online submissions we see today. How about the differences of bidding formal RFX tenders against informal tenders? One article comes from someone who has been on both sides of the table as buyer and then as the bidder.

There are the benefits of bidding in a large corporate organisation where you have the chance for personal development and progression versus trying to work with big corporates as a freelancer and the challenges that come from the bureaucracy that big companies have. How about the challenges and learning from having to re-build a bid team when you have been through a merger and acquisition and the impact that this level of change can have on a bid team.

You'll also hear from Zanne Gaynor, co-founder of Acrobat Global who promotes inclusion in the workplace and how important it is to simply get someone's name right!

As always, our contributors have risen to the challenge, and as well as the range of topics, you'll experience the diverse ways that we

all communicate and use our personalities to express ourselves in the written word. Be prepared for some dry humour in places!

There's something for everyone in this edition of Track Changes, but the constant theme that runs through everything that APMP does is the passion to share our experiences and help each other to learn and get better.

We hope you enjoy reading this and if you have any feedback or want to be included in future editions, let us know by emailing us at [trackchanges@apmpuk.co.uk](mailto:trackchanges@apmpuk.co.uk).

Happy reading!



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# THE APMP UK CONFERENCE MAKES A PLATINUM COMEBACK FOR 2022



# DONE IS BETTER THAN PERFECT...

## AND IT'S STILL D\*MN GOOD!

I wanted to take the opportunity in this edition of Track Changes to introduce myself as your newest board member, Chief Marketing Officer.

Hello, my name is Lucy and I'm a recovering perfectionist!

I spend a lot of time talking with Mildred, she's the voice in my head, the guardian on my shoulder...sometimes the devil on my shoulder! Mostly, she is trying to protect me but in doing so can sound a bit critical sometimes! She told me I shouldn't take up this board position because I wouldn't know what I was doing and would likely fail...I told you she can be critical! But if I always listened to Mildred, there's so many things I wouldn't do for fear of not getting it right, and as a result, I'd never stretch myself. So here I am as your new Chief Marketing Officer, stretching myself and living by the mantra that 'done is better than perfect!', Thank you [Sheryl Sandberg](#) for that one!

In my first month I have made a lot of social media posts, built some email campaigns, made new connections and learnt a lot more about how our great Chapter operates. Yes, I have made some errors, but in my recovering perfectionism, I accept them, I don't dwell on them, I learn from them and as a result get better.

Being self-employed for 3.5 years, 'done is better than perfect' has helped me be brave, it's stopped me from over-thinking things (or rather Mildred from over-thinking things!) enabled me to meet

deadlines and provide my clients with good quality work. As we often say in bids, don't gold plate it, just answer the question. That's what 'done is better than perfect' means to me. I've spent my time getting it right for my client rather than wasted time gold-plating it, probably more for me and my own perfectionism, than for my clients!

The same goes for social media content. Know your audience, understand what they want to hear or read and just do it! You'll know what works and what doesn't from the level of engagement each post generates. That's what I am doing in this role, learning about what you want and crafting content with other APMP members that speaks to you.

I'm very proud to be on the APMP UK board. Having the UK Chapter of the APMP provides valuable support to all of us in the bidding community. As your Chief Marketing Officer it is my job to make sure that we get the right messages out to you all so that you know what is happening and what opportunities and resources are available to you. Right now that is focussing heavily on the next Annual Conference and everything that we are laying on for you there. We're also bringing you other events and setting up more opportunities for members to meet, learn and share through webinars and other face-to-face meet ups.

You can help too. One of the ways that we can get our messages and information out there is by people sharing, commenting and

liking the content that they see. This helps get more people to attend events and become members, it helps to drive the Chapter's revenue and ultimately means the Chapter can do more for us all its members. It's a relationship, it's teamwork, and as long as we do it, it doesn't have to be and won't always be perfect, but it will be fun!

Lucy Davis is the owner of Lutrette Ltd. and offers project and bidding services to companies across defence and other government sectors, commercial and charitable organisations. She believes that all projects and bids should be run with the 4 Cs at the core – creativity, care, collaboration and communication.



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# CONVERSATIONS ACROSS THE DIVIDE

## INTEGRATING HIGH PERFORMING TEAMS DUE TO MERGER & ACQUISITION

The global corporate landscape is evolving at an unprecedented pace, with more than 62,000 merger & acquisition (M&A) deals announced in 2021, increasing 24% from the previous year (PwC, 2022). Many of these organisations have established, or fledgling, bids and proposals teams in place, and many of them have high performing individuals and teams that will be forced to work together for the first time. In any merger, organisations will be under magnified scrutiny and expected to produce results beyond anything seen by either team in the past.

**Transformational? Operational? Try being an authentic leader first.**

Long before you know which processes are optimal, or which teams need to be shaken up, you'll need to create a cohesive and effective team. The APMP Body of Knowledge advises caution before merging multiple teams or business development processes, but has little to say about the environments in which bid leaders may find themselves (APMP, 2022). Often-times in M&A activity, this can also include delivering difficult news to individuals. Lies et al. (2005 in Zehndorfer, 2021, p. 188) identified four critical characteristics of an authentic leader: self-awareness, unbiased processing, authentic behaviour/actions and authentic relations. Through this process of self-reflection and respect for the individuals, authentic leaders are seen to promote employee wellbeing and promote both interpersonal and group relationships (Zehndorfer, 2021).

The take-home point: Taking time to understand your own values, and to remove preconceptions as you engage with new team members, will ultimately drive trust and wellbeing in your team – even if you need to deliver bad news.

### Shared goals and the team as a social collection

Prior to the merged team, high performing individuals could probably state their team values, goals and objectives from memory. As the teams come together, the department leader must work with the individuals to set common objectives and a shared goal. Sherif's famous 'summer camp studies' (Sherif, 1966 in Brown, 1988, p. 252) looked at the effect of shared goals and successes on intergroup conflicts. A few days after pitting teams against each other in a tug-of-war, Sherif changed the task to require participants to work together to use ropes to pull a large truck. After working together to move the truck, the groups were seen to be less hostile towards each other as well as reducing in-group favouritism.

The take-home point: Look for opportunities to pair new team members together on directed tasks or projects. Instead of keeping high performers "in their lanes", set them together on a shared task as a way of breaking down in-group boundaries.



## Summary

The continued acceleration of the global landscape means that mergers and acquisitions will continue to affect more teams and, subsequently, their high performers. These events can place new leaders in challenging situations where previously excellent staff can get caught up in conflict and see performance drop considerably. By concentrating on the individuals in the team, including themselves, bid team leaders can develop an authentic leadership style and facilitate future high performance. Similarly, by setting shared group goals and pairing individuals across teams, they can help reduce conflict and drive cohesion.

## About the author

Chris Colquitt is an APMP Professional qualified Head of global proposal management, shortlisted for the APMP UK Leadership award multiple times. Chris has managed a number of high-potential employees through team merger activity, seeing results including increased bid performance (win and conversion rates) and management satisfaction scores. Chris is a 2022-cohort Rapport mentor with the APMP and will be studying Applied Psychology in Bids and Tenders (WBIS) at Chester University in October 2022.

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**Chris Colquitt CPP.APMP**  
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# FRUSTRATIONS WITH BIG COMPANIES

Don't get me wrong; I love many (but not all) big companies. However, I really hate starting to work with a new one.

In our small business, we seek to provide our clients with a high-end consultancy service. We help them win large public sector bids. We are very good at this. We get a lot of calls from people who have heard of us from our existing clients and want us to assist them too. Our clients get excited when they hear about what we can do for them. Very often, after an initial chat, they want to bring us in. This is when the "fun" starts.

We all know the bid deadline from the outset. However, before we are allowed to do any work for their bid at all, we have to be on-boarded through a supplier registration system. If we are not registered, we cannot get a Purchase Order. Without a Purchase Order, we will not be paid!

I get an email asking me to log on to a website. Here I am faced with, typically, 14 long pages of forms which have to be completed. Some stuff is simple, e.g. company name, company number and address. However, then I get mandatory questions about such things as how many slaves we employ and I must attach my slavery policy document. I need to detail our car sharing policies (we don't share our car) and how often we measure and report our carbon footprint. Each one of these needs a document with a version history and an update schedule. In some cases, I have had to attach photographs of HMRC website pages as displayed on my screen and provide a scanned copy of my electricity bill.

Once this is done (and, of course, the time to deadline is ticking away) we all wait for the inevitable queries. How is it that the employee register has not been completed (we have no employees) and the company car list is absent (we don't have any company cars)? After explaining on the phone that we are actually a two person company to the accounts person, we are told we will now be registered.

During this time, our Bid Manager sponsor has been trying to get financial approval to bring us in. We have supplied day rates and work estimates. However, the person with financial authority has gone on holiday and no one knows who the temporary replacement actually is. A couple of days pass and our sponsor is having a deadline induced breakdown. After a while someone realises her plight and signs the internal paperwork. Whoopee!

However, we then discover we still cannot start work because we don't have a Purchase Order number. The financial team has to set this up. They are very busy, so they do everyone a favour by doing this in only a couple of days! Now we are "good to go". Well, no, we are not!

We need access to a several large files concerning the bid and they are all on our client's SharePoint system. All we need is a login and password. However, according to the very busy IT department, we are an existential threat to the entire security of their worldwide computer systems and data. We have to supply information about our IT systems, our IT policies and sign documents pledging all

sorts if we forget our passwords. We are sent a Non-Disclosure Agreement. This says that once we sign it, all our intellectual property will be handed over to their business forever. So, I fill out another series of forms and correct a pile of legal looking documents to the point we can work with them. Then I discover that we must be trained in their IT security and the corporate IT policies before we can see any documents.

We are given a login to the training system and only have to sit through 12 modules of CBT. Each has an examination at the end so you cannot keep pressing "NEXT" whilst doing something else. This takes the best part of a day to get through (not counting the resits after failing the end of module tests). The bid deadline is getting closer. Our bid sponsor is now starting to show signs of stress.

Eventually, we get the information we need and can start work. It has taken a week of forms, frustration and fone calls (see the sneaky use of the "f"). We all commit to working evenings and weekends to catch up. In our quiet moments we ruminate on the general lack of understanding within the clients' business about bid deadlines. Why can they not see the real importance of winning bids to the entire company? We wonder why the IT department has so many hurdles to getting the essential support its business needs. Why can't all these "experts" design a secure and quick system for connecting contractors and suppliers who are essential for their own future employment? And why can't a senior person's commitment by letter or email be sufficient to engage help whilst the other parts of the company go through the administrative systems to catch up later? We have been working for a week and not made any contribution to the bid. Frustration is the polite way of expressing what we and the bid team are feeling.

I think I hate all big companies, after all!



**Andy Haigh CPP.APMP**  
#ProudToBeAPMP

# FORTY YEARS ON

## RECOLLECTIONS OF AN OLD FART

Technology has changed but it hasn't made anyone's life easier. Expectations of proposal folk are higher and the pressures greater. In compensation our profession and its value has gained recognition. The constants are great people to work with and the need to understand your customer.

In at the deep end.

Most people start small and then build up to something big. My career as an accidental bid manager started late, I was nearly forty, then ran in reverse.

My first bid was a monster: took months, cost of thousands and budget to match. My last was a two pager for a small consultancy. The first hand-written, typed in the typing pool with graphics added using hot wax. The last on a PC working from home.

Oliver. (1986)

The first thing that I realised on my 'baptismal' bid was that we did not have a clear understanding of or good relationship with the customer. So when the regional sales director asked me if there was anything I needed I asked, "Could I have a proper salesman?" He gave me Oliver.

Oliver was a class act: RAF tie, club in St James and a business card that read (as I imagined) "Oliver X, Systems to the Gentry". While I fielded the regular project meetings with the customer PM, Oliver was feeding me the intel that let us get the offer where the customer wanted it.

A lifetime later, I was helping a customer set up a global proposal support centre. I used to wonder "How on earth are these people meant to understand the customer's issues when they don't live in the same time zone as the account team? How do we communicate effectively across artificial organisation and functional boundaries?" Is there an AI version of Oliver to read between the lines and tell us what the prospect really wants?

Brian (1986)

Brian was the hero of my first bid. He ran the reprographics department so it fell to him to get the monster proposal out of the door. That meant photocopying on two giant Kodak photo copiers, drilling, then binding in custom printed binders. Just in case of problems Brian had the Kodak organisation on standby across South Hertfordshire. Even so, just to meet the deadline Brian and his team worked round the clock 'til bleary eyed they saw its safe on time dispatch.

Printing and finishing services are now online services or replaced by customer portals. Just upload your PDF and press the button. But I can't help feeling that Murphy's law as it applies to proposals states that if things do go wrong, they will during the production phase. Must mean more pressure on proposal folks; I don't envy them. I think we had it easy but Brian might disagree.

'Pep' (1990)

A few job postings after my first bid, I was running a small UK

business unit selling packet switches. My team was maxed out dealing with requests from our colleagues in Spain so I called a halt on new opportunities.

I arrived to work one morning and found a stranger sitting in the outer office. He introduced himself as 'Pep' the account manager for a Barcelona based bank. It wasn't on my carefully qualified prospect list. But I reckoned that if he'd shown commitment by flying to the UK to ask for our help, we could at least return the compliment. We put a team together and hacked out a solution that fitted his customer's budget and requirements. Pep was a fan of Fawlty Towers and would lighten the technical conversation at times with a "Que?" or "I know nothing."

Pep flew back with our offer and we arranged for the customer decision makers to come over on a reference visit. Our welcome dinner for them was at an Italian restaurant in a pub just off the M40. The waiters overheard our guests chatting and immediately switched to Catalan when serving them. Our guests were delighted; they thought we'd planned it. After that I reckon, we'd have had to screw up big time to lose the business. Pep's deal was the first in our expanding Spanish pipeline to close.

Eddy (1995)

I don't always work for the sellers, sometimes I get to 'do unto them' as well.

Shortly after I fell off the greasy pole of corporate employment, I found myself advising an investment bank on building a new European rates network. My technical sidekick was Eddy with whom I'd worked at XCo\* twenty years earlier.

Eddy did his stuff analysing network traffic while I set about researching the market, contacting suppliers and putting together a Request for Information. The RFI responses duly arrived and

Eddy and I set about analysing them. One in particular impressed and surprised us; it was from XCo. This was clearly not the firm we knew of old. It answered our questions, was well presented and described options briefly and clearly. We briefed the client on our findings so far and looked forward to receiving the XCo response when we issued the RFP.

The RFP responses arrived and there in the middle of the pile was a monster. Its two four inch binders made our hearts sink. The contents were mostly boilerplate. Our requirements were unfindable amid the thicket of bumf. I rang the XCo account manager. "What happened?" I asked. He told me that at the sales review the director had qualified out arguing that an American bank would surely opt for XCo's American competitor. Sales support was denied. "But we knew you had to have a response," he continued "so we did what we could in our spare time. I'm sorry it's so big. We didn't have the time to make a tailored response."

I told him that what he should have done is call me and I'd have got the VP Corporate IT to call his boss. He would have told him that XCo was front runner. As it was they blew it. Eddy made himself another cup of tea and picked up the next vendor's proposal. We had a project to finish.

\*Name changed to protect the guilty. The innocent can look after themselves.

Andy (2011)

Andy is an old friend and a luminary of his profession. He is also pretty bid savvy so I was surprised when he asked me to help out with a bid for PM consulting services. This was the sort of thing his firm would normally take in their stride. But timescales were short, there were a couple of specialist subbies involved and Andy was busy with other clients. I was anointed whipper in.

After a rapid planning session and telephone kick-off content contributions started to trickle in and I was soon in the familiar email and version control hell. I pined for the days, before email, when we used to manage giant software systems with just a photo copier and clear engineering life-cycle. Today we'd call it DevOps. Is there an equivalent for proposals?

Andy offered no opinion. He was busy with his client.

Will he ever finish?

Times and technology change. The pace is quicker, the demands on proposals teams greater yet what I most remember and what remains is the great people I get to work with.



**David Warley CPP.APMP**  
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# RUNNING A PROPOSAL TEAM WHEN RFXS DON'T DRIVE REVENUE

Your company is doing great, 120% of revenue targets. Only one problem, only 30% of that revenue is generated from RFX opportunities. Not all companies require a formal RFP to procure solutions and services. There can be variation on how companies procure based on market, geography and segment you sell into.

I don't hear much about companies like this at APMP events or talking with other bid managers. I work at one. I am sure others do too. I'll share some of my experience and how it may differ from companies where a larger (>50%) proportion of revenue is RFX generated.

This is not THE story, only my story, based on my knowledge and experience. Take what you like, leave the rest. If we ever meet and you want to talk further, let's have a pint and discuss.

If your business of delivering high quality, customer focused and differentiated RFX responses is only driving a small amount of revenue, I would guess that you are experiencing:

- Lack of interest in your business. Do you get invited to key business meetings?
- Lack of resourcing. Last in line to get headcount or other investment?
- Lack of adherence to your processes. Sales people ignore you or not follow process?

Maybe these happen to you even if you are driving >50% revenue?

## Tips for survival

Here are some tips to help you cope in a world not dominated by RFX business.

### Tip 1: Show projections with and without your contributions

What do the financials look like without the revenue that is generated by RFX? Does it turn a great year into a so-so year? If your win rate is high, show that you have a better conversion rate on deals than the non-RFX business.

### Tip 2: Go broad

You and your team know a great deal about all aspects of selling. Sell your advantage to the sales organisation in a broader context. An introductory email to a client is sort of like an executive summary. Help sales write it or create some templates that are awesome. Create some one-page cheat sheets on different topics like:

- Client discovery.
- Ghosting the competition.
- Responding to customer questions.
- Value proposition articulation.

Offer to improve the overall company's sales performance beyond just RFX. Make your world bigger.

### Tip 3: Go Proactive

Don't wait for an RFX. Develop proactive proposal assets and skills. Help sales work upstream and prevent RFX in the first place. I doubt you will completely work yourself out of a job. Show you are focussed on overall company performance and are willing to use your team's talents to drive revenue in innovative ways. Deliver a cracking proactive proposal template that will help speed up the sales cycle and your world will change.

### Tip 4: Get Super-Efficient

If you can't generate a ton of revenue, at least you can provide some cost savings. Try to find ways that will integrate your team that also save money. What if you leveraged the marketing team more for graphics? What if the entire company used your knowledge management system versus just some departments? The more you are seen as an integral part of the business, the better.

### Tip 5: Be Happy

Not everyone works for a company that generates most of their revenue via RFX. But you sell in a unique way that no one else can do. You are a sales leader of a sub-segment: The buyers who procure via RFX. Your team might not be customer facing in the traditional sense, but your words may reach more people and create a more lasting impression than those said over golf or coffee. Be proud of what you do.

Not being the centre of attention can have its advantages. You sometimes get to see the larger picture from outside. With a few changes, you can be a highly valued part of the organisation even if you are only delivering a small percentage of revenue.



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# A BID PROFESSIONAL'S CAREER

## ONE PERSPECTIVE

Where and who you work for will impact on your experiences of the profession. This is my view from the privileged position of a large corporate organisation.

### Big organisation, big bids?

Large organisations have the capacity to deliver large opportunities so we get to tackle challenging and innovative tenders. Equally, we also do small, quick turnaround bids. You can move around the bid teams perhaps playing a supportive role in a large bid, then leading a smaller one before moving on to later lead larger bids. A large corporate doesn't restrict you to just the large bids but rather expands the opportunities.

### Change and progression

With the right company you can have multiple careers without having to leave. The joy of a larger organisation is there are more people to inspire you and act as mentors. If you take the training model of 70% learning on the job, more opportunities should lead to a better training experience. With larger organisations also comes more capacity, which better enables flexible working and other supportive systems and benefits. An expanding large organisation also is more likely to be able to cater to your career growth aspirations – no dead men's shoes here!

Same client, same work, same old..

If variety is your thing, working for an international, multi-sector company means you will not be stuck bidding similar work, even if you want to grow your experience in one sector. The joy of a large company is that there is room to do both. You may even take up the opportunity to move from the bid team to the delivery team for a while, potentially expanding your insight for later bidding.

### Corporate, restrictive?

As a large organisation there will be policies, procedures and corporate governance. These are in place to protect the company and minimise waste. They can allow you to channel your innovation and energy into making a difference for your client rather than needing to use that energy re-inventing wheels or fighting battles not worth fighting. A good company will welcome and actively encourage continuous improvement and challenge. Good procedures are a distillation of best practice and experience and leave room for innovation. The best large corporations have become large by being agile and responsive to the needs of their clients and markets. Their bid professionals are at the forefront of those conversations and strategy development.

So if you are considering a career as a bid professional and hadn't considered working for a large corporate business, what are you waiting for? Jump in, the water's lovely!

Kathy has worked for Jacobs and its predecessors for nearly 21

years. From the outset, bidding played a role in her career as she worked alongside experienced colleagues to secure the next project for their team. Her bidding career continued in this manner for a number of years, initially supporting and then leading bids to win work that she and others would then deliver. In 2010, Kathy transitioned into bid management full-time. She worked initially in a sector specific bid team and later in the central strategic bid team supporting the delivery of the company's largest and most complex bids. In 2021, Kathy took up her current role of Sales Commercial Manager, making a transition from proposal management to focus on a new perspective of bidding.



**Kathy Hills CPP.APMP**  
#ProudToBeAPMP

# IF BID MANAGERS WERE ZEBRA, WOULD THEY BE BLACK WITH WHITE STRIPES OR WHITE WITH BLACK STRIPES?

It's hard to imagine another profession where you can accelerate your career whilst not needing to necessarily stay in the same industry or sector. The ability to almost give yourself a career change whilst not starting from scratch fascinates me. And I've also managed to take advantage of it.

Over my ten year bidding career I've worked in public sector, private sector, large corporates, small SMEs, retail, B2B, government, defence and international. And unless you've moved around a bit, it's very easy to assume that bid management means the same to everyone. Perhaps this is why it is so difficult to get a universally recognised definition of what bid management is. Perhaps to some bid management is admin, whilst to others it is strategy and so much more.

There is a common thread regardless of your flavour of bid management. One of the great things I find about events, particularly face to face, is the networking. The sharing of problems and realising regardless of what sector you are from, some challenges are the same.

Getting your technical people to answer the question not just write what they want, deleting the words "we would like to thank" from the executive summary, deleting your company name from the document because it's in there over 1000 times. When we come together, we become herd of zebras. Those similar challenges have caused us to earn our stripes. When we come together, it is very

easy for us to all talk the same bidding language.

But perhaps some of those flavours are more different than I first thought. My most current role is in a large defence organisation, bidding mainly into the Ministry of Defence for the UK. And it's easy for that version of bidding to become the norm. PQQs, Arial 11 font, the Authority, clarification questions, MEAT, extension to deadlines, hard copies and CDs, word count restrictions or worse character counts! If you shudder at some of those words, you too are familiar with a similar flavour of bidding. But that wasn't always my norm.

When working with international governments bid bonds and INCOTERMS kept me awake. In the B2B sector you could miss a deadline and just email the customer saying sorry it will be tomorrow. I once worked with a team and they confessed that before I came on board they had never submitted a bid on time. That wouldn't fly in my current organisation! And then there's the small SMEs, where governance was waving a printout of Excel in front of the MD and finance director for their sign off. Literally walk into their office, tick job done. No feeder reviews. No conference calls with 20 people on it. Each of those different flavours of bidding required a different approach, style and nuanced process.

They were all still bidding. Just not the same flavour of bidding.

And so, as the challenges we face earn our zebra stripes, the differences in those experiences can change our stripes. Sometimes

we are white with black stripes. Other experiences make us black with white stripes. I've been fortunate enough to mix my stripes up a bit, but we are all still bidding zebras.

My advice is to embrace being a zebra, but know you have the ability to gain different bidding stripes through different sectors and industries.



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# THE SAME BUT DIFFERENT

## OVERVIEW OF LARGE, COMPLEX BIDS AND HIGHER THROUGHPUT BIDS

In my (over 25) years in sales, of which over 15 have been in bidding it's become clear to me that not all bids are equal; nor are all bid processes. I've been privileged enough to work on complex, multi-year nine figure deals involving substantial teams at capture and bid stages and on small team, practically solo opportunities. In this brief article I'm going to talk through some of the commonality and some of the differences I've seen between the two.

Big bids	Small bids
Tend to be higher value.	Tend to be lower value.
Tend to permit longer timescales (although many Authorities are reducing response times towards the minimums permitted by Public Contract Regs). The days of the 26 week response build are in decline.	Responses tend to have less time, and may not even be working to Public contract regs minima (for B2C, being first past the buyer's eyes is sometimes an advantage).
Response requirements tend to be more structured, to allow structured assessment.	Wider spread of requirement types. May be structured or not depending on customer. B2C customers fall at both ends, some with no structure requirement, others with PCR levels of structure.
Tend to have larger capture team.	Tend to have smaller/no capture team beyond account management/sales.
Tend to have a larger bid management team.	Often run by small team or individual.
Tend to separate out the disciplines within a bid (operational, commercial, financial, legal).	Often run by small team or individual or rely on standard or near standard approaches/terms/content.

Even with this quick, and VERY generalised, view it's not difficult to see why one size doesn't fit all bids, and the table above doesn't even look at the variations created by the buyer's sector or industry.

If all bids, and the time and money available to deliver the bids, were equal then we'd always do all steps with equal diligence, with a large team with segregated responsibilities, following best practice at all times and always drafting each response as a specific one-off to the specific requirements of the buyer but often that's just not practical. Let's take a look at a couple of examples that highlight the differences and also illustrate the caution that needs to be applied when considering an approach to bidding.

**RESOURCE ALLOCATION.** Both types of bid need the right person(s) available and working on them.

It can be difficult to justify the resource on a specific capture team for each opportunity when the bids are worth only in the single or double digit thousands. However, we still need to know customer pain points and how our solutions deal with those so may lean on a knowledgeable SME instead. It's important that SOMEBODY has identified the pains of the customer and how your solution deals with those so they can be expressed in a bid or proposal.

**POTENTIAL RED FLAG:** When organisations default to 'industry generic' pains and/or generic solutions at a feature level then there's a risk of being 'busy fools' and continuing to deliver bids with no hope of winning. This can happen when management, particularly senior management, look at throughput as a metric for bid team performance and want as much of the response as possible to come from a content management system. When the metric is speed, the victim is ability to bespoke the response. Keep an eye on your solutions and ensure they are tailored to your potential customer.

**BID/NO BID DECISIONS/GOVERNANCE.** Both types need appropriate checks to make sure the bid has a chance of success.

For large bids which are heavily resourced, it is important to have and manage a bid budget and to hold pertinent and impactful governance meetings through the course of the opportunity. When they work well, these allow assessment of the bid, likelihood of winning and present opportunity to back out if the deal starts to look poor. For smaller bids, and particularly those with a solo-bidder this kind of scrutiny is usually impractical. Each individual bid may not be business critical but the cumulative flow of these bids is. Sensible bid/no bid calls still need to be made and can often be done earlier in the process as part of a Blue Sheet or equivalent

rather than through the bid response process if time is tight.

**POTENTIAL RED FLAG:** In either big or small bids, good governance can be overridden by strong personalities with vested interest in the pursuit, making it feel like you'll be bidding no matter how unattractive the offer becomes. It's easy to forget that high throughput teams/individual bidders still need to focus on winning bids. They should be fed opportunities with a realistic chance of a win rather than an expectation of "submit something, we might just stumble into it". Ensure you always have some form of review, even if it's just a quick teams call, where it's documented that the decision to proceed or halt was made, by whom and why.

**POTENTIAL RED FLAG:** The sunk cost fallacy can come into play where there is a large and committed team in place – after all, why not continue to bid, after all you've already invested so much in the pursuit? Make sure your governance process contains active proceed/halt decision steps so you don't sleepwalk into a bid you can't win simply because you've already invested time in it.

Specificity. Both bids need quality, well written content within the time available.

For large, complex, high value, long-term bids everything should be done bespoke. All content should fit the requirement and should have been properly structured and scrutinised, ideally through multiple review cycles. This is in direct contrast with the fast-paced proposal world where the desire is for as much repeatability as possible to allow rapid throughput, quick and easy editing and prudent decision-making. Content libraries for this type of proposal work are a Godsend; money invested in their setup and subsequent maintenance is money well invested.

**POTENTIAL RED FLAG:** Content libraries for large, bespoke, opportunities. The lure of a content library is strong. It's understandable desirable to want easily accessible content but we

care must be take that the desire for easy access doesn't translate into the desire for 'easily cut/paste' content at the expense of specificity. Content libraries for large bids need a different form of maintenance in general making it easier to find smaller chunks of more specific information, compared to the high throughput teams' desire for as much as possible to come from the library and where their concern is accuracy and currency of the content as it is pulled because they have less edit/review time available to them.

The single biggest red flag is when organisations try and design a one-size-fits-all process or system to cover the entire spectrum. The major risks in my opinion are of either over-administrating high throughput bids through use of governance best suited to high value work or of limiting the bespokeing of large scale bids through over-use of stock content.

We, who work in these fields, have similar pains but not identical solutions to them. We are the same, but different.



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# IF I WERE TO ASK YOU WHAT BID MANAGEMENT ENTAILED, I AM SURE THERE WOULD BE MANY ANSWERS

We all have a point of view of what bid management is but with so many variations it will be difficult to experience the full range unless you spend your life in the profession.

APMP gives us a great forum in which to share experiences and broaden our knowledge beyond what we know ourselves. For example, take the difference between corporate (using internal procurement standards or limited processes) versus public sector (with its structured procurement process under OJEU, the Official Journal of the European Union), to paperless and e-auction bids versus in-person bid fairs, the range is truly broad.

From my own experience, with over 20 years in the business, I started on the other side of the procurement process as the buyer working with internal procurement teams to acquire IT services and software. Once I made the transition to being the vendor initially in a outsourced IT team that was sole source through to working for a truly independent IT service provider, the differences are significant.

I have been fortunate to work on some very complex and large bids which have given me a great insight into the bid practices that work well and those that do not. Every bid whether successful or not is a lesson to learn for the next bid.

The APMP Body of Knowledge offers a great framework in which to structure your bid and to expand or simplify based on the actual conditions that the customer requires. Whilst I have not worked

as a freelancer myself, I have employed freelancers, and it is really important to have clear terms of reference of what you expect from the freelancer and what your delivery standards to meet your needs; this applies to internal teams too.

Communication is an essential foundation of any successful bid team, together with clarity of purpose, proper bid plans that set out accountability and track progress against milestones that are understood and achievable. Today 'win rates' are still relatively static, only rising 0.22 of a percent between 2013 and 2020 (for IT Services across the industries).

There is still more to do, just knowing when to step away and qualify out is a skill in its own right, to being consistent in answering the questions. This may seem obvious but you would be surprised at how often teams feel they know better than the customer.

As we move further into the 21st century the shift to digital submissions is increasing, and with it comes a need for brevity and concise answering of questions. Often there are online portal submissions that have limits to word counts, and images. This allows procurement to use AI tools to assess responses against criteria, which in the private sector tends to be undeclared. Public sector is much more open to sharing the evaluation criteria to help all vendors put their best submission forward.



Having come out of the global pandemic, the need for remote working, will only increase the shift to digital, this will suit the Gen X and Gen Z bid managers of the future, who are being educated in a digital world and are comfortable in digital communication tools.

We older generations will need to adapt If we want to continue to be successful in our bids or maybe think about retiring.

#### References:

[OJEU](#)

[APMP](#)

[Statista](#)

[CIPS - Global Standard for Procurement and Supply](#)

[CIPS - Digitalisation in Procurement and Supply](#)



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# A NAME REPRESENTS IDENTITY....

We often talk about the importance of taking time to learn a person's name. It might sound like basic advice but using a person's name is a key starting point to creating an inclusive environment in the workplace. Asking how to pronounce a colleague's name can feel awkward. But not knowing how to say it properly may mean that you avoid talking to that person. If your name is unusual, you might well have experienced this.

In a recent BBC article<sup>1</sup> by Dhruvi Shah different professionals share their experience of people getting their name wrong at work. Dhruvi herself says her name can auto correct to Dorito. Colleagues might mispronounce her name as 'Dirty' or they misspell it as 'Druhti'.

As somebody whose name was shortened at birth to Zanne, I'm frequently called Zana, Zannie, Zane and even Sam. Just for the record, it's pronounced Zan and it rhymes with can, van and man. Research<sup>2</sup> shows that our brains light up when we hear our name and I still feel an instant of joy every time somebody addresses me by the name that I like to be called.

I recently received the card (pictured)...and while it might bring a wry smile to your face, for me there's a serious message going on here. If you don't take the time to learn a person's name, you may not have the same level of interaction and understanding that you would have with someone whose name you recognise and pronounce correctly.

Our names form an integral part of our identity. Investing time in learning how to pronounce and spell a person's name breaks down communication barriers and opens up social interactions. An inclusive and collaborative working community enables everyone



to use the name they prefer and have their name respected. It creates a sense of belonging and well-being.

So, how can you make sure your workplace is inclusive and welcoming when it comes to names?

Here are our top tips.

- Listen to how your colleague pronounces their name.
- Ask how to pronounce your colleague's name correctly. If you don't get it right the first time, ask again and keep trying.
- Don't change or shorten a name just because it's easier to say.
- If you're given two names, check which is the first name and which is the surname.
- Double-check the spelling especially if texting or emailing and the auto correct is on.
- Advise others in your team on how to pronounce someone's name.

Zanne Gaynor is co-founder of Acrobat Global with Kathryn Alevizos.

**Zanne Gaynor**

<sup>1</sup> <https://www.bbc.co.uk/news/business-46362259>

<sup>2</sup> <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC1647299>



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