

Capturing Social Value

Explore the wisdom of building social value into your sales campaigns before the formal procurement phase begins.

Setting the scene

Suppose you've been talking to Government social value policymakers or reading articles by social value consultancies. You will have gathered that internal stakeholder engagement and supplier dialogue are recommended before issuing an Invitation to Tender (ITT) or Request for Proposal (RfP).

Sounds great.

But there's a problem.

It doesn't happen very often.

So, as suppliers, we need to take action.

Capture in context

The earlier we get involved in the 'Buying Cycle', the better. Let's picture a generic five-stage buying cycle aligned with a corresponding five-stage sales cycle, as shown in Figure 1.

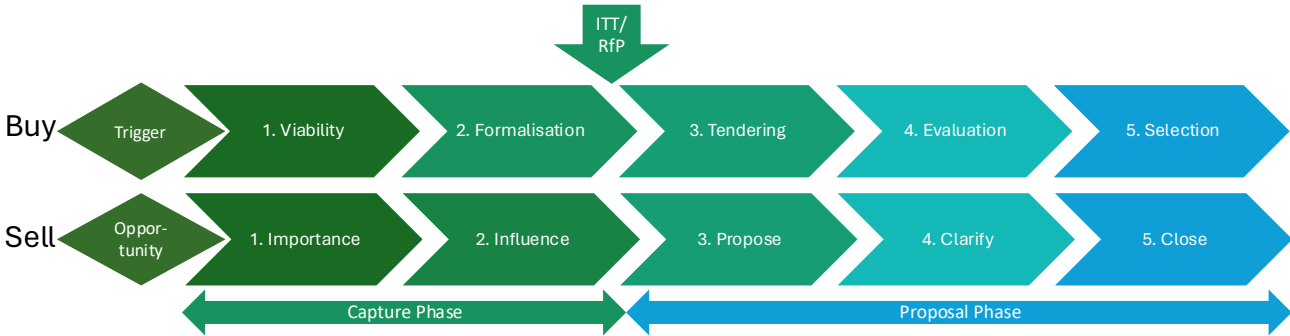


Figure 1: Typical buying and selling cycles

The labels may vary, but the essence of the stages stays the same; publication of an ITT or RfP signifies a move from open to controlled engagement

In Figure 1, we can see that the first two stages form the 'Capture Phase.' During this period, suppliers can talk freely with buyers. After tender documents are published, the last three stages form the 'Proposal Phase,' when procurement carefully controls engagement. We need to take advantage of the pre-procurement capture phase; it may last weeks, months or years and is an iterative process to improve your probability of winning.

At this point, I can hear many readers saying, "But I don't do capture; that's a sales responsibility." That will often be the case unless a salesperson doubles up as a bid manager or a dedicated capture manager is appointed to nurture the opportunity and run the bid. Hence, it's crucial to educate everyone in a sales role about social value so they can add intelligent social value conversation to their repertoire.

Social value in capture

Let's look at what buyers and suppliers are doing at each capture stage and how to build social value from the beginning. The term 'buyer' is used generically to refer to anyone or a group of people in a client or prospect organisation involved in the purchasing process; typically, this includes procurement and business people.

- **Trigger <-> Opportunity:** This is when something changes, and the buyer realises they need to buy something. The change could be anything from new legislation, technology or management to replacing end-of-life equipment. Before the trigger occurs, the buyer is probably content with the status quo and not in 'buy' mode, although they may be keeping up to date by reading and chatting with peers.

If you're on the ball, you'll monitor your potential buyers for triggers. While you're waiting, you'll be positioning your organisation as social value savvy and committed to positively impacting people and communities, the local economy and the environment. You can do this by publishing social value policies on your website, writing white papers and case studies, running programmes and participating in social value forums online and in person.

By the time the trigger event occurs, your buyer will easily be able to see your track record of social value commitments and thought leadership.

- **Viability <-> Importance:** Once the trigger event has happened, the buyer will start exploring what's required and possible. They may consult colleagues and peers, conduct research and engage with suppliers.

If you've spotted this activity, you've found yourself an opportunity and can start capture work in earnest. Ideally, you'll create direct engagement with the buyer and begin to build a relationship. Through empathetic and intelligent dialogue, supported by high-quality marketing, you'll make yourself interesting and valuable to the buyer.

Even this early, you should consider the role social value will play in the opportunity. Research the buyer's social value maturity and stance and any models they use. Imagine the social value impact potential for this opportunity – discuss it with the buyer. This is your opening gambit to steer the social value 'ask' in a sensible direction and make sure it's not left to the last minute.

You may find they haven't thought about it – they may not even be aware of it. If your buyer is a business buyer, they may believe that social value is a procurement matter to be dealt with at the tendering stage. Your job is to educate them that to achieve the desired outcomes social value is a business matter to be designed early, procured responsibly and delivered collaboratively.

- **Formalisation <-> Influence:** If the viability activities have gone well, the buyer will get ready to buy. They will start to formalise a business case to get financial approval and document requirements to form the basis of an ITT or RfP.

If you've done your positioning well, you are hopefully in pole position to win already, but you can still do more to influence and shape the procurement. Continue engagement and dialogue, provide budgetary estimates and solution visions through meetings, presentations and demonstrations.

And keep the social value conversation going. Your aim is to end up with relevant and proportionate tender questions that allow you to respond with a compelling social value commitment. Your early research should have identified which model your buyer uses, so get

familiar with it and steer them in the direction that will suit your planned commitments. For example, if your buyer is in central Government, they will have to use the [UK Government Social Value Model](#), so make sure you know which themes, policy outcomes, Model Award Criteria (MACs) and sub-MACs are relevant.

From capture to proposal

Great capture leads to great proposals. When you've done your research, influenced the buyer and developed a social value strategy, you'll be well-prepared to transition smoothly into developing a compelling social value proposal. And when the ITT or RfP arrives, hopefully, the social value questions are what you're expecting.

For guidance on developing your responses, remember to refer to the APMP UK Social Value Group guides: *"How to tackle a social value response in a public sector tender"* and *"How to answer the model question in the UK Government Social Value Model,"* both available in the [APMP UK Community Area Resource Library](#).