IPI Academy

falconbury



Presented by
Falconbury

Commercial Proposal Writing and Bid Management

1-2 February 27
+ 6-7 October 27

Develop practical skills to create customer-focused commercial proposals, demonstrate your unique value, manage contractual risk and respond effectively to RFQs, RFPs and ITTs, increasing your chances of winning profitable business.

Format:
Live online

CPD:
12 hours for your records

Certificate of completion

Course overview

In today's highly competitive and regulated procurement environment, getting the proposal right is about more than just responding to a brief - it's about creating a clear, commercially strong and legally robust offer that meets customer needs, manages business risks and showcases why your offering is the preferred option.

This practical and intensive training course has been expertly developed to help commercial and contracts professionals master the art of crafting compelling proposals that serve as both legal and sales documents. From understanding legal positioning in the bidding process to confidently defining scope, pricing risk and articulating value, the expert trainer will explore every critical element that strengthens proposals and increases win rates.

You'll also learn how to clearly align your proposal with your customer's decision-making criteria, showcase your organisation's unique offering and manage the entire bid lifecycle with structure, compliance and clarity.

Whether you're dealing with RFPs, RFQs or ITTs, this training course will help you build persuasive proposals that appeal to potential customers in meeting their needs while protecting your exposure to potential risks.

Benefits of attending

By attending this training course you will:

- **Learn** how to develop strategic, customer-focussed proposals that focus on client's needs and priorities
- **Reduce** legal risk by understanding how proposals become binding and how to avoid hidden legal pitfalls
- **Understand** how to enhance risk management by aligning price to risk exposure and limiting liability with effective wordings
- **Get to grips** with developing clear value propositions that differentiate your offer
- **Master** bid processes by streamlining the process and ensuring compliance through structured internal reviews
- **Enhance** your executive summaries and communicate with impact
- **Gain** confidence in engaging with procurement professionals during the bid process

Who should attend?

This training course will be particularly valuable for all professionals involved in drafting, negotiating or reviewing proposals, including:

- Commercial managers
- Contracts managers
- Contract negotiation specialists
- Proposal / Bid managers
- Project managers
- Business development managers
- Strategic account managers
- Procurement managers
- Operations managers

Programme

Day 1

Module 1: The proposal as a legal document

Understanding the bidding process and legal implications

- Pre-qualification (PQQ's) / preferred suppliers; Request for Information (RFI); Request for Quotation (RFQ); Invitation to Tender (ITT); Best and Final Offers (BAFO)
- Legal considerations:
- Confidentiality – Non-Disclosure Agreement / Confidentiality Agreement
- Quotation v Invitation to Treat. 'Subject to contract'
- Battle of the forms, Offer and Acceptance. The proposal forming part of the legally binding contract
- Offer duration / expiration

Capturing your scope of supply within a legal framework

- Clarity of offer
  - Clearly defined obligations and ownership of those obligation including 'dependencies' on Customer
  - Clearly defined acceptance criteria / measurement mechanism
  - Assumptions & Caveats
- Exercises – Drafting / reviewing a scope of supply. Peer / Red Team reviewing

Pricing to reflect the allocation of liability / risk

- Allocation of liability / risk and reflecting it in pricing:
  - Clarity of ownership of liability / risk if obligation not met
  - Ensuring price reflects allocation of liability / risk. Quoting subject to own standard terms and conditions or Customer's terms and conditions
  - Liability for 'fit for purpose' - Performance specification v Conformance specification
  - Exclusions / Indemnities / Disclaimers / Limit of Liabilities
  - Managing identified high probability / high impact risks through the contract / solutions not contingency budget
- Exercise – Price v Scope / Liability & Risk. Removing ambiguity / passing or reducing liability to enable removal of contingency.

Internal governance process

- Purpose and value
- 'Go/No Go' / 'Bid/No Bid' reviews
- Proposal and Pricing Approvals / Peer or Red Team Reviewing
- Authorised Representatives / Power of Attorney

Module 2: The proposal as a sales document

'WHY' first, then 'What'

- 'Start with Why?' (Simon Sinek) – TED Talk video
- Exercise – 5 Whys
- Exercise – Applying the same principles of a 'Performance Specification' to drafting a proposal. The outcome of a Performance Specification not the input of a Conformance Specification

Understanding your customer's needs. What is their 'problem' that needs solving?

- 5 Rights of procurement – Quality, Quantity, Place, Time, Price
- Commercial Off-The-Shelf (COTS) / standardised v bespoke / need for innovation, research and development
- RAQSCI - Regulation, Availability, Supply Quality Assurance, Service Requirements, Cost and Innovation
- 10 C's - Competency, Capacity, Commitment, Control, Cash, Cost, Consistency, Corporate Social Responsibility/Clean, Culture and relationships, and Communication
- Corporate Social Responsibility (CSR) / sustainability

Programme

Day 2

Understanding your customer's selection criteria / priorities

- Kraljic matrix - customer's businesses priorities - critical, strategic, tactical or bottle neck
- Iron Triangle - Scope, Schedule, Cost
- MIL - Must have, Intend to have, Like to have
- Exercise - MIL

Winning themes - showcasing / story-telling 'WHY' your offering is the Customer's 'Best Realistic Alternative' (BRA) / how it meets your customer's needs / priorities

- Identifying / communicating your Unique Selling Proposition
  - Porter's generic strategies – cost leader, differentiation, niche
  - Defining the Value Proposition: unique benefits, measurable value, differentiation/competitive advantage
- Rationalising your price. MEAT - Most Economically Advantageous Tender / value for money
- Instilling confidence - demonstrating not just stating. Evidencing credentials / capability / credibility
- Addressing any negatives past experiences / reviews / issues
- Capture the key points in your Executive Summary
  - When to write it
  - Structuring, style and content to reflect audience
- Exercise – Asking leading, open questions of your Customer. PULSE model (Position, Understand, Leverage, Solution, Evolve)
- Exercise – Capture information from previous exercise and draft Exec Summary

Offering deviations from requirement set out in RFQ / ITT

- Proposing alternative / additional options separately from core offering. Explaining reason for deviation, e.g. value added / benefits of alternative / additional options
- Offering a solution which addresses future requirements
  - Identifying potential opportunities (SWOT – opportunities) for: increased market share and/or cost savings / value engineering (improvements / efficiencies), and showing how these might be realised
  - Addressing potential challenges / risks (SWOT – Threats / STEPPLED – Social, Technological, Economic, Environmental, Political, Legal, Ethical, Demographics), demonstrating how these will be managed to minimise criticality
- Exercise – Drafting subsection of a proposal offering opportunity
- Exercise – Drafting subsection of a proposal offering a pro-active risk management contingency plan

Module 3: Writing the proposal to enable easy evaluation

- Answering the 'exam question' / using customer proforma provided in RFQ but still embedding: WHY you; your unique selling points (USPs) / what differentiates you
- If no customer proforma, suggested proposal structure.
- Complying with bid requirements to avoid elimination, enable easy evaluation / comparison by the customer ('apples for apples'), demonstrating respect to retain good relations.
- Clarity & easy of understanding. 5C's / 7C's of communication – concise, clear, complete, correct, consistent, coherent, concrete, courteous
- Exercise – 5C's writing skills

Module 4: Managing the bid process

- Timing / planning the process to allow Red team / Peer reviewing / Internal governance process complied with
- Engaging stakeholders
- Selecting and role of bid team members

Presenter



Catherine Hurst

Catherine Hurst BSc(Hons), CIMDip, PgDL, is an independent consultant in the contract and commercial fields. She was formerly a Commercial Manager at BAe Systems, following previous contract/commercial roles with GEC and Siemens. She has extensive practical experience of bid management, contract drafting and negotiation, contract and subcontract management as well as commercial risk management, both with UK and overseas customers and suppliers, in the private and public sectors.

She is a highly experienced trainer, having a style which brings a subject to life, creating interest and stimulating the enthusiasm of delegates. She combines academic best practice with real world experience.

She lecturers Chartered Institute of Procurement and Supply (CIPS) diploma, levels 4, 5 & 6 at Chichester college. As well as being a member of CIPS, Catherine has a degree in Management Studies, a Chartered Institute of Marketing diploma and more recently achieved a distinction in her Common Professional Examination (CPE)/Post-grad diploma in law, winning the prize for the highest achieving student in the contract law module.

Catherine has successfully provided training to organisations across a wide variety of industries, including:

Transport / utilities / energy / construction / engineering / IT / telecons: Network Rail, ScotRail, Balfour Beatty, London Underground, Westinghouse Springfields Fuels, General Dynamics, Siemens, Metronet, Thales, ABB, Hitachi, Jungheinrich, Honeywell, PALL Europe, Senior Aerospace BWT, RES (Renewable Energy Systems), AGI, Silvertown, QinetiQ, Clyde Pumps / Weir Pumps, Scottish Power, NCOC (North Caspian Operating Company), Computacentre, CISCO, BT, United Utilities

Health / pharmaceutical / education: Nuffield Health, Surrey PCT, Bristol Myers-Squibb, Newcastle University, Exeter University

Public: Forensic Science Services, Office for National Statistics, DARA (Defence Aviation Repair Agency), Metropolitan Police

Charity: Phoenix Futures, Homegroup

Retail: Co-op

Course dates

1-2 February 27	**Live online** 09:30-17:00 **UK (London)** (UTC+00) *Course code 16978*	GBP **999** ~~1,199~~ EUR **1,399** ~~1,679~~ USD **1,607** ~~1,919~~ **Until 07 Dec**
6-7 October 27	**Live online** 09:30-17:00 **UK (London)** (UTC+01) *Course code 17289*	GBP **999** ~~1,199~~ EUR **1,399** ~~1,679~~ USD **1,607** ~~1,919~~ **Until 11 Aug**

How to book

Online:
ipi.academy/3342

Alternatively contact us to book, or if you have any queries:

Email:
info@ipiacademy.com

Phone:
+44 (0)20 7749 4749

Discounts

- Booking more than one delegate on any one date qualifies for a **30% discount** on the second and subsequent places.
- Most events qualify for an **early booking discount** prior to 6 weeks before the course date. Be sure to check on our website, where the latest discounts will be shown.

Further information

Fee
The fee includes all meals and refreshments for the duration of the course (for venue-based courses) and a complete set of course materials (provided electronically). If you have any particular requirements, please advise customer services when booking.

Please note
IPI Academy (and our training partners) reserve the right to change the content and timing of the programme, the speakers, the date and venue due to reasons beyond their control. In the unlikely event that the course is cancelled, we will refund the registration fee and disclaim any further liability.

Terms and conditions
The rest of the our terms, the event cancellation policy and the terms and conditions are on our website, please visit ipi.academy/content/terms-and-conditions

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For your FREE consultation and to find out more about how we can work with you to solve your training needs, please contact our training advisers:



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IPI Academy

IPI Academy is a training initiative of Falconbury and Management Forum; leading providers of industry training for over 30 years, based in the UK.

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