
Overview

This standard is for you if you are involved in writing and / or submitting a bid.

It is relevant to in-house bid professionals, technical specialists, marketing, sales and business development teams and business owner / managers.

**Performance
criteria**

- You must be able to:
- P1 confirm the design, terminology, format and writing style for the bid and any templates or specific instructions which apply
 - P2 agree the overall bid solution and individual section or answer plans
 - P3 confirm responsibilities for writing and contributing to sections of the bid within the bid team or externally, where appropriate
 - P4 draft the bid in line with the section or answer plan, liaising with other bid team members and consulting key stakeholders, where appropriate
 - P5 ensure that the draft bid takes account of research and reflects the requirements set out in the bid documentation
 - P6 write clearly and persuasively in language appropriate for the audience, stressing the organisation's differentiator(s), solution and benefits, and showing how the offer meets or exceeds the buyer or funder's requirements and adds value
 - P7 maintain configuration management of versions during the writing process
 - P8 conduct appropriate reviews of the draft at key development stages to ensure readability, fit to bid requirements, win themes and bidder strategy
 - P9 conduct a compliance check against a bid checklist or compliance matrix
 - P10 submit the bid in line with the bid plan and obtain confirmation of receipt

Knowledge and understanding

You need to know and understand:

- K1 appropriate legal, regulatory and ethical requirements that relate to bidding
- K2 current best practice relevant to bidding
- K3 the organisation's guidelines for bid writing including house or generic style guides
- K4 bid formats, designs and writing styles
- K5 how to draw on research and past bids as part of the drafting process
- K6 techniques of written communication and the correct use of grammar and punctuation
- K7 methods of proofreading
- K8 different methods of reviewing bids, including, peer, colour and executive reviews
- K9 the organisational procedure for managing, protecting, and storing bid documentation
- K10 how to undertake a compliance check

Additional information**Skills:**

- Bid project management
- Giving and receiving constructive feedback
- Lone working skills
- Team working skills
- Proofreading
- Time management
- Question analysis
- Interpretation
- Writing

Glossary:

Answer plan: sets out the structure for the proposed answer to the bid. An answer plan can include tools and techniques such as Storyboarding, bid skeleton, page plan, mock-up.

Bid solution: the bid solution, at this stage, has been reviewed and agreed and covers the way in which products or services will be delivered as a result of a contract being awarded.

Configuration management: a discipline specifying and checking (1) the characteristics of an item or product; (2) controlling changes to it; and (3) recording and reporting changes to its status. (*Definition from the Free Dictionary - amended*)

Compliance matrix: is a table that shows where the buyer / funder requirements are addressed across the proposal. It may map requirements down to the section or page of the proposal, showing where these are answered and show word counts, etc.

Colour team reviews: are often conducted as part of a business development and proposal process.

- Blue team reviews: reviews and updates initial capture strategy and capture plan (especially in a larger bid team).
- Red team reviews: reviews final proposal draft - including price and budget - to predict how the buyer / funder may score the proposal.
- Pink team review: reviews storyboards and mock-ups (plans of bid content) to confirm solution set and to validate proposal strategy.

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- Gold team review: an approval of final proposal and price.
 - Black team review: predicts one or more competitor solutions.

Win themes: are a limited number of higher level features and benefits that transcend the entire bid or proposal. Traditionally linked to commercial bids, the concept is of increasing relevance to - and use in - grant funding.

Links to other NOS:

- CFABAA211 Produce documents in a business environment
- CFABAA614 Prepare to communicate in a business environment
- CFABAA615 Communicate in a business environment
- CFASSLS51 Develop sales proposals and quotations

CFABAT004

Write and submit the bid



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