Proposals and Tenders – Hints and tips

Meeting of LNG group on May 23rd 2005

As the group gathered we shared the thoughts and ideas we each used when putting together proposals (and, to some extent, tenders). We covered only the written proposal and didn't get into doing presentations for clients.
We offer the conversation for the group.

Beforehand

- Find out about their business – do your research
- Recognise the naivety of clients who may know little about T&D. They don't always know what they want and could take what you offer even if it's not the best/right solution.
- Do a good LNA – spend a day with the client and the staff
- Ask wise questions
- Talk to the right people – the person with the money and the staff at the coalface doing the job
- Find out what internal support there will be after the learning event. It's the way your work will fix on site. But be honest with the client and tell them that, without it, you can't be responsible if the learning fails.
- What does a client expect to pay? Are there ways of finding out so you can pitch your fee right?

Include

- Use a common template for each proposal so you don't forget what to include – and there's one on the LNG website. It also shows consistency when you present a second proposal to a company.
- Executive summary for a longer proposal
- A brief outline of the design and what it might include, but no detail, unless you want the client to put the course together for themselves. Just a summary of the topic, learning outcomes and what they are buying.
- Your role
- Their role
- Build in some sort of follow up or evaluation after the work has been delivered
- Next steps following your sending in the proposal – follow up phone call so they can ask you questions etc.
- Money – rather than using the term *Costings* it might be softer to refer to the money as ***Investment summary*** or ***Investment required.***
    - Break down the costs into bite size pieces like ***the cost per head.***
    - State what your organisation normally charges and then quote a ***preferential day rate*** for the client.
    - Consider if you need a % up-front
    - Quote what the organisation will save as a result of your work

- No free tasters – there is a perception that something offered without charge has no value. There are always people who apply for free courses and then don't turn up because they've lost nothing.
- Some sort of credibility statement. Some people send a c.v. with or after the proposals. Credibility statement could include existing client list and testimonials.
- You might put in silly quotes if you don't want the work, but what do you do if they accept the quote. Is it better to be honest from the outset?

Presentation of your proposal

- Ask the client if they want to receive the proposal by email or hard copy. But the group preferred hard copy in any circumstances, so do that as well, and use decent paper e.g. 120–160 gms.
- Great book by Shelly Rose Chavret called "Words that change minds"

Contracts

Getting the client and your organisation to commit to a contract. Some of the group use them and others didn't.
Are they worth a jot?
Does a follow up agreement letter suffice?
At the very least, write a letter that confirms when and where and how you will start, once the client has agreed to go ahead.

Professional indemnity

This is a must for us professionals. There are several places you can get it including through CIPD.