

The Winning Proposal



Sales Process and Playbooks

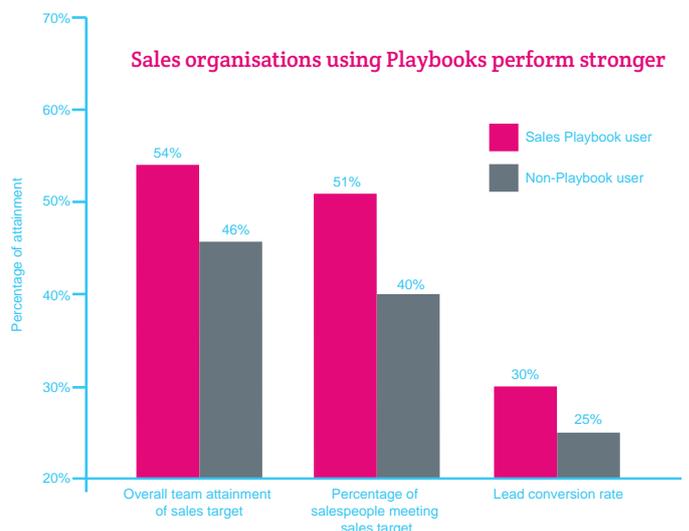
A prerequisite of success in bidding is having an optimised bid process. But how does your bid process fit with the rest of your business and its overall priorities? Does a Bid Manager, for instance, have the absolute right to insist that a director submits something for the bid when that director is really busy with other really important business? Do you have an objective, accepted mechanism for balancing conflicting demands ... or do you just argue the toss as and when such conflicts arise?

Is bidding ultimately the responsibility of Sales? Or what about Marketing? Both? Perhaps another department entirely!?

The most effective and successful bids are undertaken by Bid Teams working to a clear bid process, but within the broader context of the Sales Process and Sales Plan.

Such considerations might appear somewhat esoteric when you are focused on getting the next bid out of the door on time ...

... but an inability to see the bigger business picture may be hampering the success of your organisation and bringing the Bid Team into conflict with senior company managers and directors ... at precisely the moment you need everyone to pull together for the sake of a world-class bid submission.



Source: Aberdeen Group ("Sales Playbooks: How the Best-in-Class Connect Marketing and Sales through the Entire Selling Cycle")

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Research by Aberdeen shows that organisations that have deployed a Sales Playbook sell 8% more against target than organisations that have not yet deployed a Sales Playbook. 54% of salespeople using a Sales Playbook are likely to meet their sales target. That figure drops to just 46% where there is no Playbook available to the sales team.



The convenience and dynamism introduced by playbooks are guiding sales people to higher levels of performance, and there's no reason why your Bid Team should not be able to enjoy these benefits too.

Today's dynamic, situationally aware Playbooks are helping business development professionals and Bid Managers focus on exactly what they should be doing to progress a deal through each of the stages quickly and successfully.

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The Power of Visualisation

The need to resolve prickly and even dangerous internal situations of this type is why we help clients refine their business process to fully align with their bid process and its resource requirements.

Visual, interactive playbooks can really bring this alive for Bid Managers and Writers and secure the on-going commitment of the wider business. Follow the steps laid down in your sales playbook for superior win rates.

Sales Playbooks have been around for ages ... in the form of two or three page summaries of the key steps, responsibilities and dependencies in a sales process.

But Playbooks have changed. They are now dynamic, online and available wherever you are via whatever device you prefer to use.

Playbooks are helping organisations meet sales targets more easily and with greater predictability.

The problems that a lot of B2B sales organisations face is that any given sales process can be complex with twists and turns that are not always predictable. And even with less complex sales your salespeople may be handling so many opportunities at any one time that it is impossible for them to be do exactly the right thing all of the time.

A Sales Playbook builds upon your established, proven sales processes and protocols to embed best practice into every-day selling – including bidding - thus improving revenue generation.

In other words, a Sales Playbook is a sales tool which takes existing best practice in Sales and turns it into a step-by-step guide for each deal for all.



Duncan Cranmer [of the Winning Proposal] enabled Castleoak to formalise a structured process. His facilitated workshops worked well, encouraged positive collaboration and achieved a swift outcome. The process was swift, professional and got senior colleagues on the same page quickly.

Head of Marketing, Castleoak Group





Duncan [Cranmer of the Winning Proposal] is a strategic thinker and skilled facilitator who is expert at getting a group to push beyond surface knowledge to truly understand new concepts. He is quick on his feet and able to command an audience. Highly professional and easy to work with. Duncan would be an asset to any organisation and someone I highly recommend.

EMEIA Service Quality Lead, EY (Ernst and Young)



Playbook Benefits

Everyone in the Sales team and the Bid Team has the benefit of access to the tool, and a well-designed Playbook is referenced and used every day by the majority of sales professionals.

Benefits include:

- Superior **guidance and coaching**
- Provision of the **right information at the right time** – information that is directly relevant to their unique selling /

bid situation.

- Meets the need for **improved speed and efficiency**
- Drives **improved consistency** within the team, holding **excellence as a realistic target** for every sale and every proposal
- Harnesses the value of **team working**
- Improves sales forecasting **accuracy**
- Delivers **more sales and bigger sales** – faster

The Workshop

Our Sales Process / Playbook workshop triggers a better understanding of how Sales and Bidding fit together within your business.

So as to deliver maximum value in your workshop we meet with nominated representatives from the Bid Team, Sales as well as with those performing important support functions around your proposals (e.g. Marketing, Product Management, Operations etc.). Your Managing Director and / or CEO may wish to be involved.



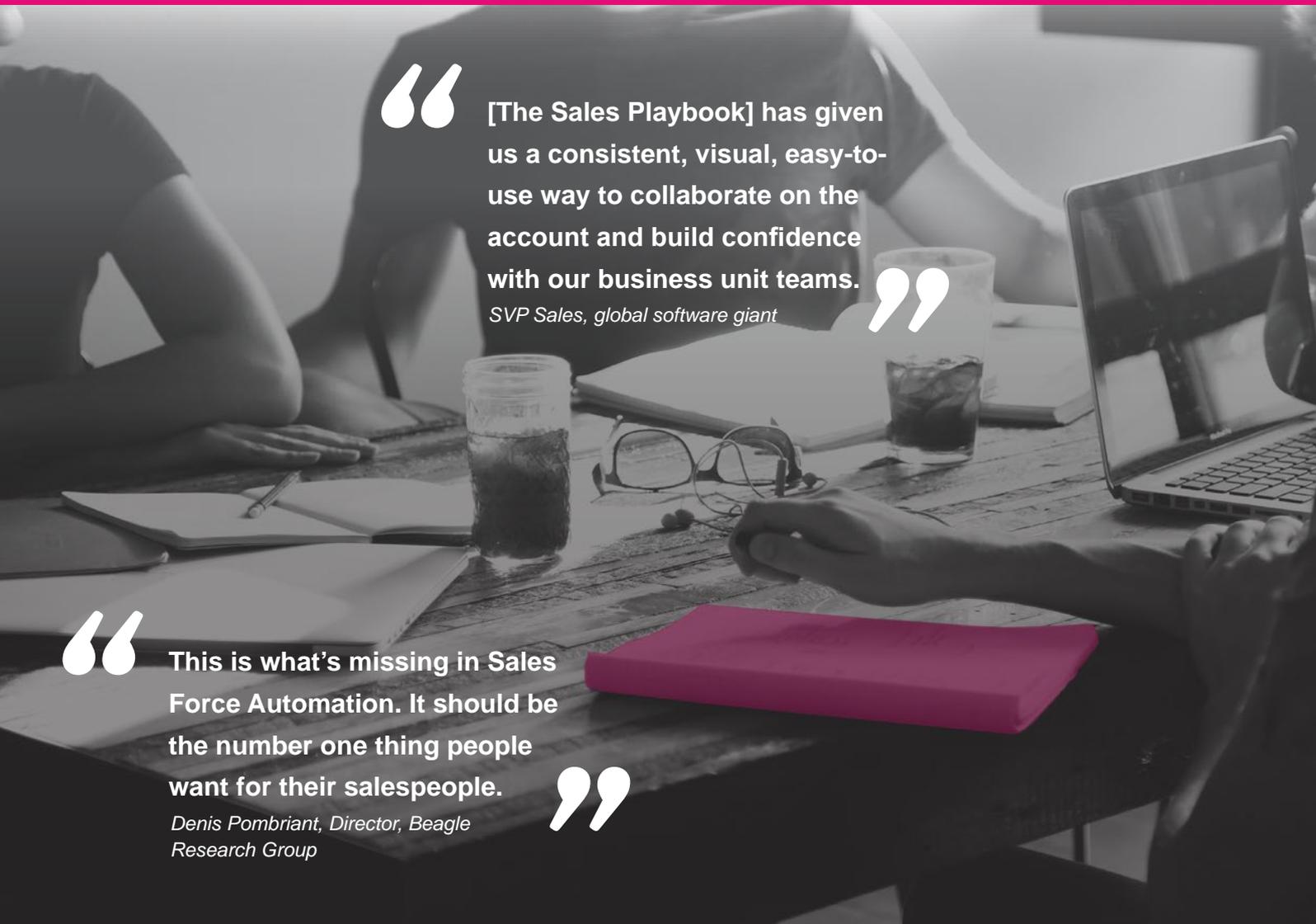
[The Sales Playbook] has given us a consistent, visual, easy-to-use way to collaborate on the account and build confidence with our business unit teams.

SVP Sales, global software giant



This is what's missing in Sales Force Automation. It should be the number one thing people want for their salespeople.

Denis Pombriant, Director, Beagle Research Group





In six weeks they helped grow our funnel by £65m, £31m of which became closed business within four months - a fantastic achievement!



Strategy and Marketing Director



Prepare

Design

Sales Playbook Workshop

Define Formal Process

Go Live - Win more Sales

Discovery interviews point the way to how your Sales processes can be bettered; and on this basis your workshop is designed and structured for maximum participation and impact.

The Winning Proposal's workshop brings together your team to openly and collaboratively discuss, share and agree best practice.

Our facilitated workshops are great opportunities to reflect on what has worked well in different sales situations, and what has worked less well.

The key attributes of success and best practice are identified and recorded on the day.

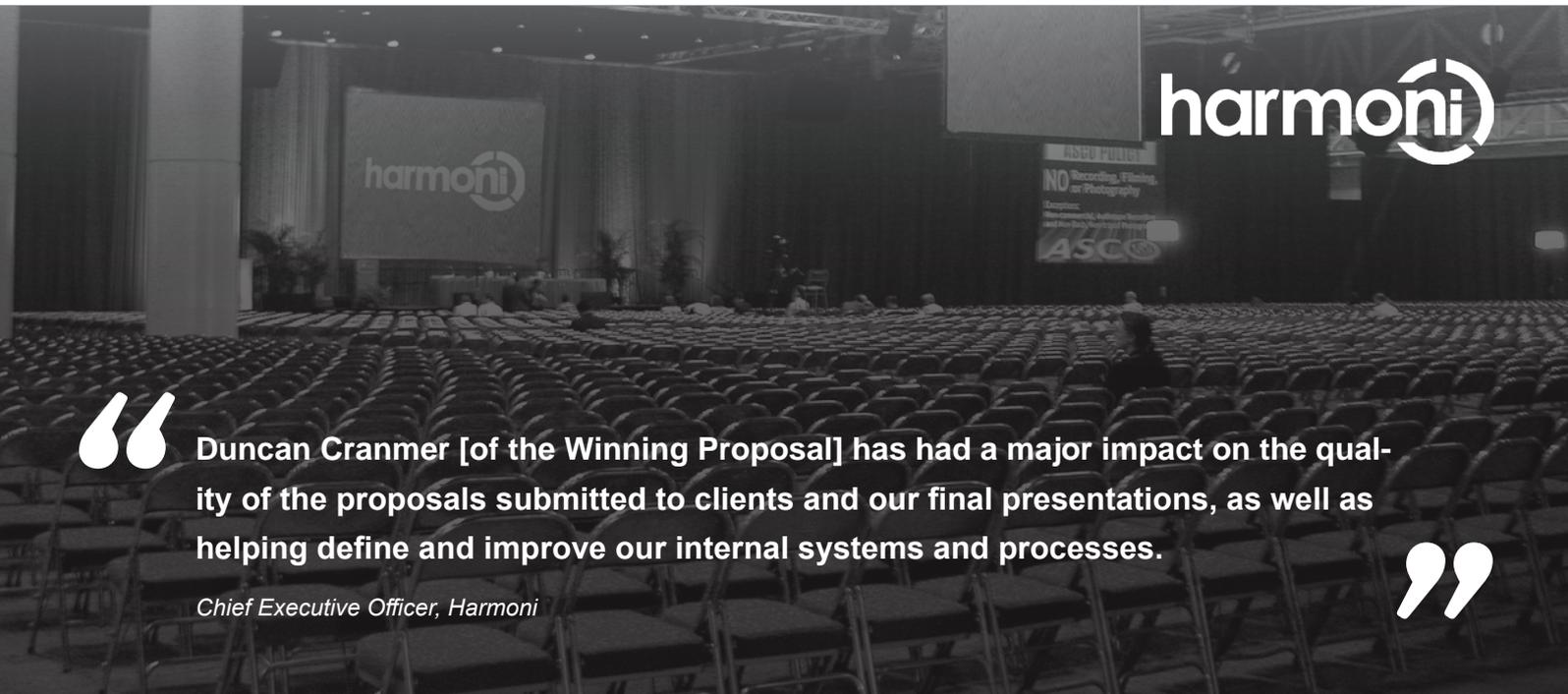
This best practice is subsequently fully documented for you and carefully reviewed with your leaders and directors until formally approved; at which point the new process is shared with everyone involved in selling and bidding.

The format of the final output is entirely down to you.

In the past the preferred deliverable would be a process flow diagram and / or short summary of the approved process. And this may be your own preference.

But increasingly the need is for interactive sales playbooks embedded into the corporate CRM system such as Salesforce.com and Microsoft Dynamics.

In a world where everything is increasingly just one tap of the finger away via a tablet, phone or PC, the impact of your newly-defined sales process might be heightened by deploying it within your CRM platform?



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Duncan Cranmer [of the Winning Proposal] has had a major impact on the quality of the proposals submitted to clients and our final presentations, as well as helping define and improve our internal systems and processes.

Chief Executive Officer, Harmoni





[They] made important suggestions around the process that made our proposal work faster and better, as evidenced by our much improved win rate.



Graham Jones, Programme Director and Bid Controller, DoctorLink



These guys bring real rigour to developing top class, high value proposals. Working truly as part of our own team they have set the project plan and assisted in the definition of, and adherence to, the right process for the job in hand. The results have been outstanding.

David Beckett, Chief Executive Officer, GTD Healthcare



How does your bid process fit with the rest of your business and its overall priorities? Do you find that the Bid Team is frustrated or even completely let down by those who you feel you have a right to rely on but who are unable (or downright refuse) to get the submissions in on time because of other business priorities? A Sales Playbook maps out the responsibilities of key personnel within your business making the efforts of revenue generation less onerous, more collaborative and ultimately more lucrative.



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