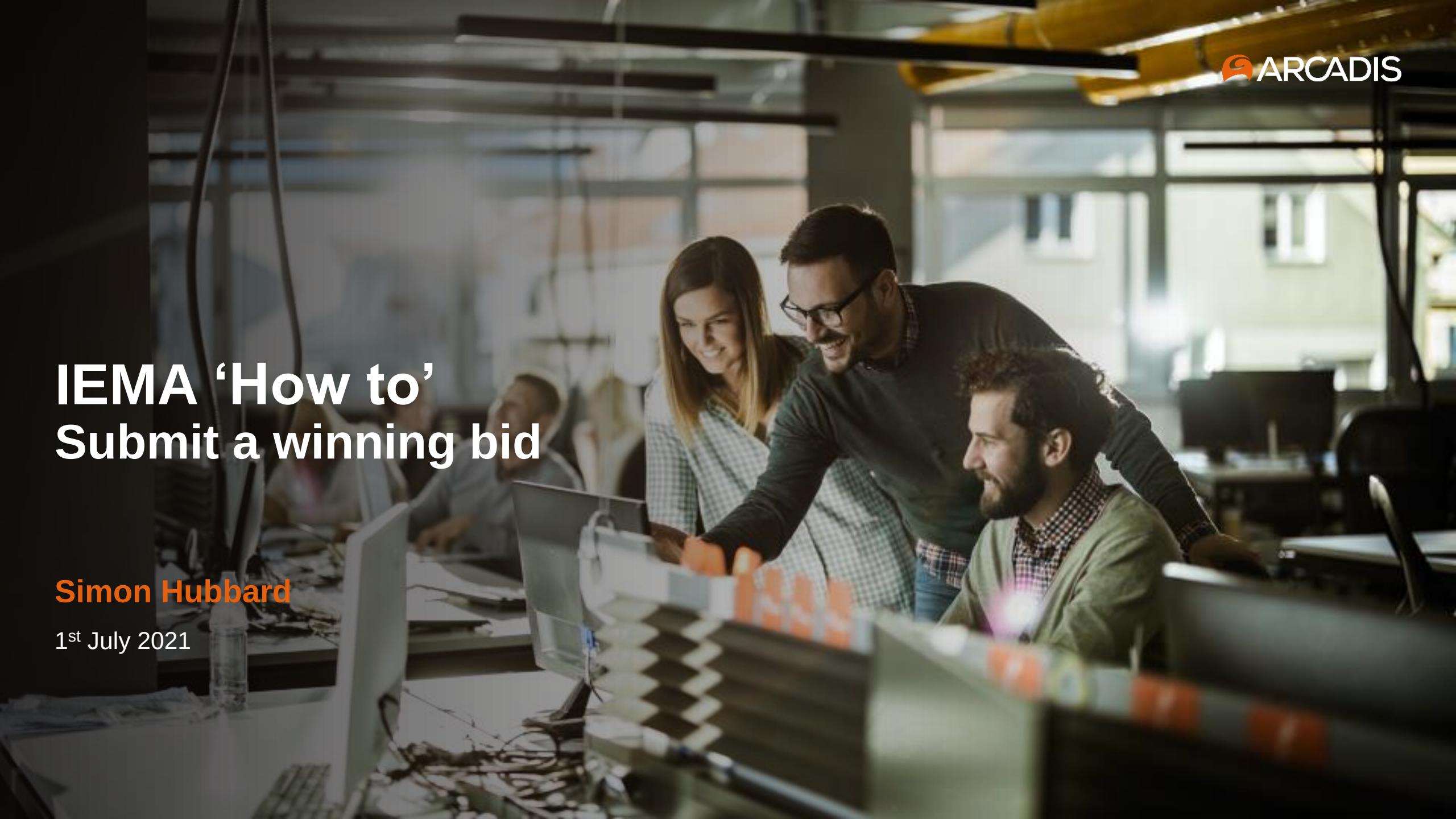


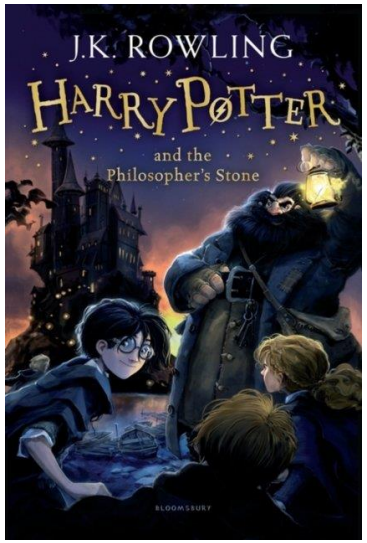
IEMA ‘How to’
Submit a winning bid

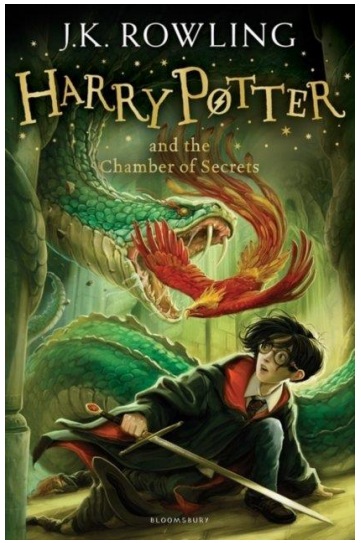
Simon Hubbard

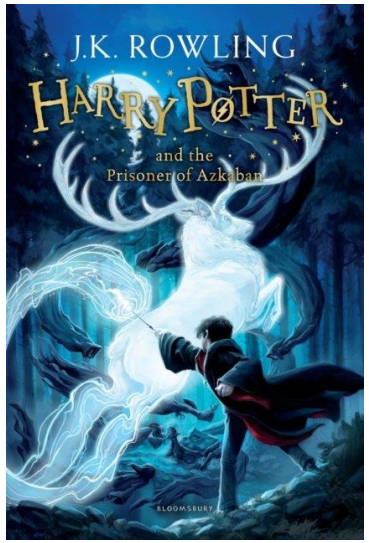
1st July 2021

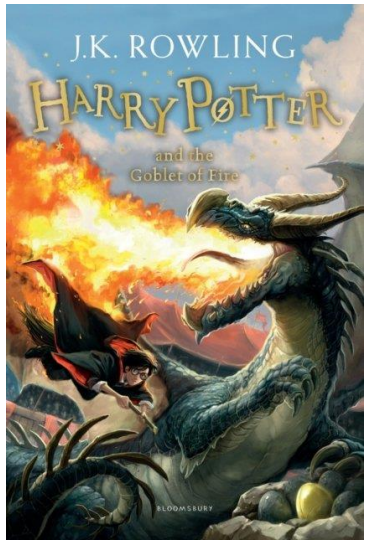
“There’s always room for a story that can transport people to another place”

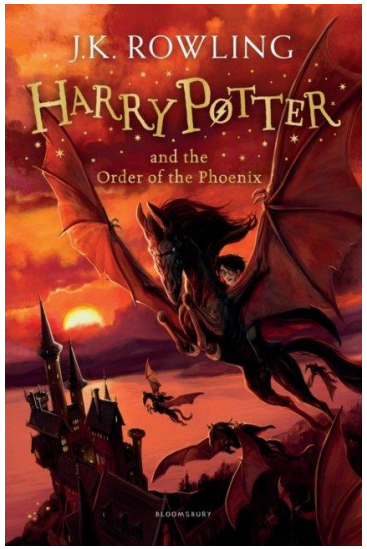
J.K. Rowling

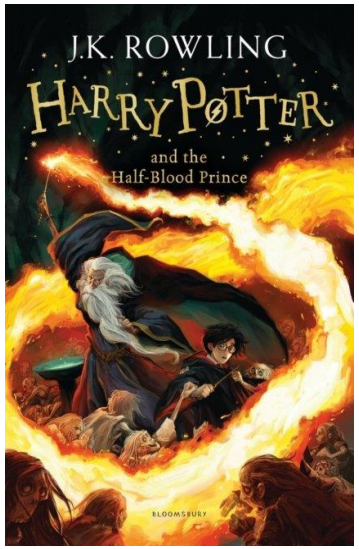

J.K. ROWLING
HARRY POTTER
and the
Philosopher's Stone

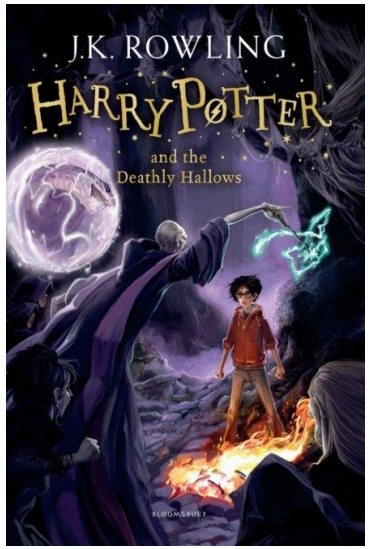

J.K. ROWLING
HARRY POTTER
and the
Chamber of Secrets


J.K. ROWLING
HARRY POTTER
and the
Prisoner of Azkaban

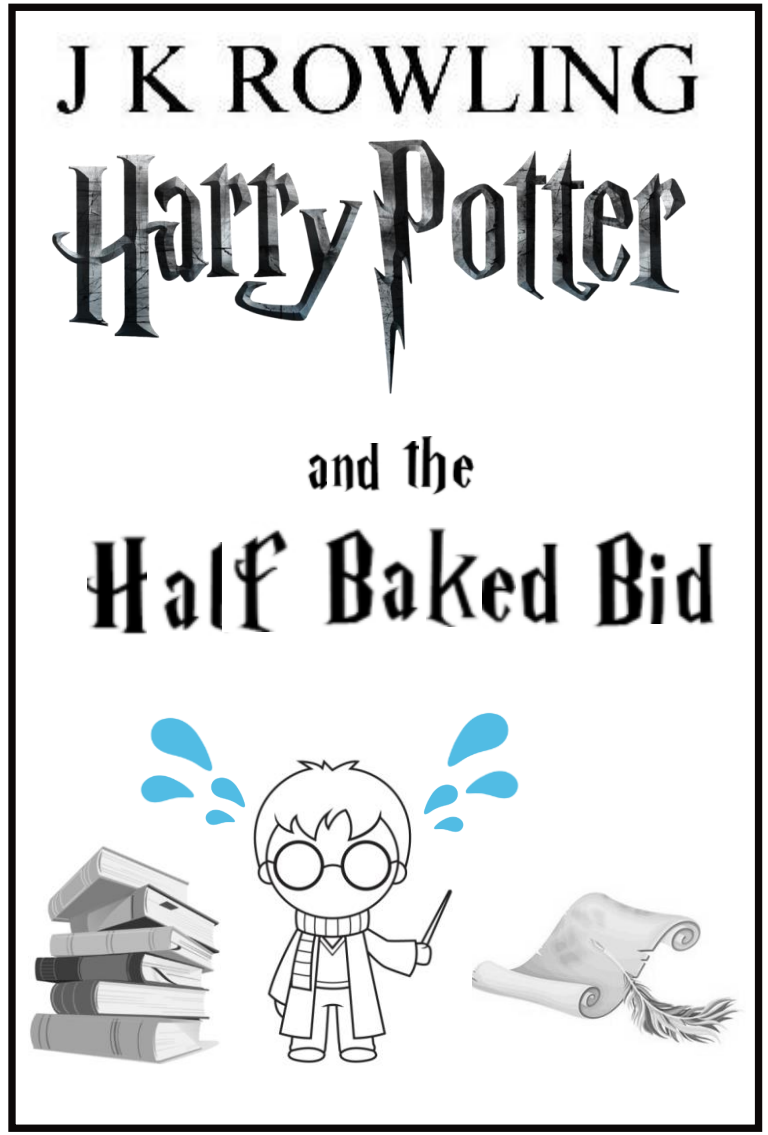

J.K. ROWLING
HARRY POTTER
and the
Goblet of Fire


J.K. ROWLING
HARRY POTTER
and the
Order of the Phoenix


J.K. ROWLING
HARRY POTTER
and the
Half-Blood Prince


J.K. ROWLING
HARRY POTTER
and the
Deathly Hallows

… ?


J K ROWLING
Harry Potter
and the
Half Baked Bid

How to submit a winning bid

Bids are about storytelling

#1 Start with the recipient of the bid in mind – the reader

#2 Build a plan around the rules of the game – the storyboard

#3 Write clear, concise and compelling text – the narrative

#4 Include effective graphics and layouts – the visuals

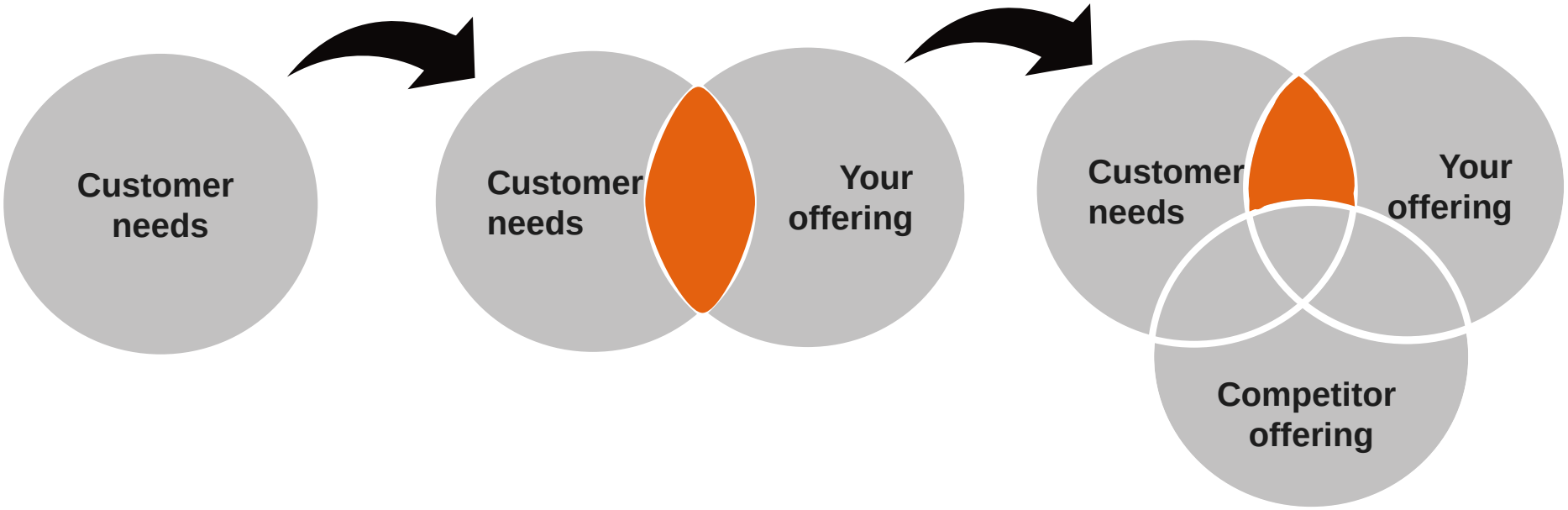
#5 Use reviews to add value and improve – the best

#1

Start with the recipient of the bid in mind

The reader

Bids are written for the customer – our offer must explain how it overcomes their problem and gives them what they need



“One can never have enough socks. Another Christmas has come and gone and I didn’t get a single pair. People will insist on giving me books”

Albus Dumbledore

Harry Potter and the Philosopher’s Stone

The reader

Bids are written for the customer – our offer must explain how it overcomes their problem and gives them what they need

1. Start with the recipient of the bid in mind

1.1 Identify the decision makers

Economic buyer

Ultimate budget holder with authority to appoint

User buyer

Day-to-day interface who lives with our solution

Technical buyer(s) / procurement

Gatekeepers who evaluate and influence

Sponsor (or anti-sponsor)

Influential senior who wants us (or a competitor) to win

Perception: what do they think of you today?

Profile: what are their drivers, pain points and gains?

Empathy: what do they ‘think’, ‘feel’, ‘say’ and ‘do’?

1.2 Use SWOT analysis to build win themes

Strengths

Build on our strengths

Weaknesses

Address our weaknesses

Opportunities

Ghost competitors’ weaknesses

Threats

Neutralise competitors’ strengths

Why our team?

Why the competition?

Actions: to build understanding / improve position

Bid strategy: internal team tactics to help us succeed

Win themes: external messages we will use throughout our bid

#2

Build a plan around the rules of the game

The storyboard

Bids are often prescriptive and require responses to specific questions (these may not be the topics we wanted to write about)

Question	%	Winner's score	Your score	Client feedback
T1. Understanding and methodology (5 sides) Proposed approach describing key activities and deliverables Methodology - inc contract management and managing subs Demonstration on how value will be added	25.00	18.75	6.25	25% of the available score / 68% off the winner's Only half of the available page limits used Approach did not include activities and deliverables Nothing about how the contract will be managed Sentence cuts off on p4 so no justification of approach
T2. Quality of resource (5 sides + CVs) Relevant experience of similar task for each team member Key staff (synopsis, role, expertise, involvement by stage) CVs (2 page per person) inc relevant experience / qualifications Confirmation of availability for the duration	25.00	18.75	12.50	50% of the available score / 33% off the winner's More evidence of relevant skills required No evidence of relevant modelling experience No explanation of transferrable / added value Lead individual did not have the role required chartership
T3. Delivery and risks (2.5 sides + programme) Detailed programme to deliver services Full project plan with clear milestones Full resource schedule (person days by role) Any risks associated with delivery and management rationale	10.00	7.50	5.00	50% of the available score / 33% off the winner's Incomplete programme – only showed early stages Little detail of detailed activities below overarching stages Some evidence of risks and mitigation but not much detail No detail how client resources would collaborate / interface
T4. Innovation and problem solving (2.5 sides) Demonstrate the innovations and problem solving you will bring Must be directly relevant to this project	10.00	7.50	5.00	50% of the available score / 33% off the winner's Some evidence of innovation and problem solving But not clear how this would add value to the commission
	70.00	**52.50**	**28.75**	41% of the available score / 45% off the winner's **Insufficient to reach (40 out of 70) threshold**

“Dark times lie ahead. There will be a time when we must choose between what is easy and what is right”

Albus Dumbledore
Harry Potter and the Goblet of Fire

The storyboard

Bids are often prescriptive and require responses to specific questions (these may not be the topics we wanted to write about)

2. Build a plan around the rules of the game

2.1 Fully understand the bid requirements

- **Logistics** - when, where, what, how …?
- **Style** – open story, prescribed answers …?
- **Restrictions** – page / word limits, diagrams …?
- **Evaluation** – weightings, marking definitions …?
- **Format** – hard copy, upload, character boxes …?
- **Language** – client terminology, understanding …?
- **Focus** – big ticket items, interdependencies …?

What must we include or do to be compliant?

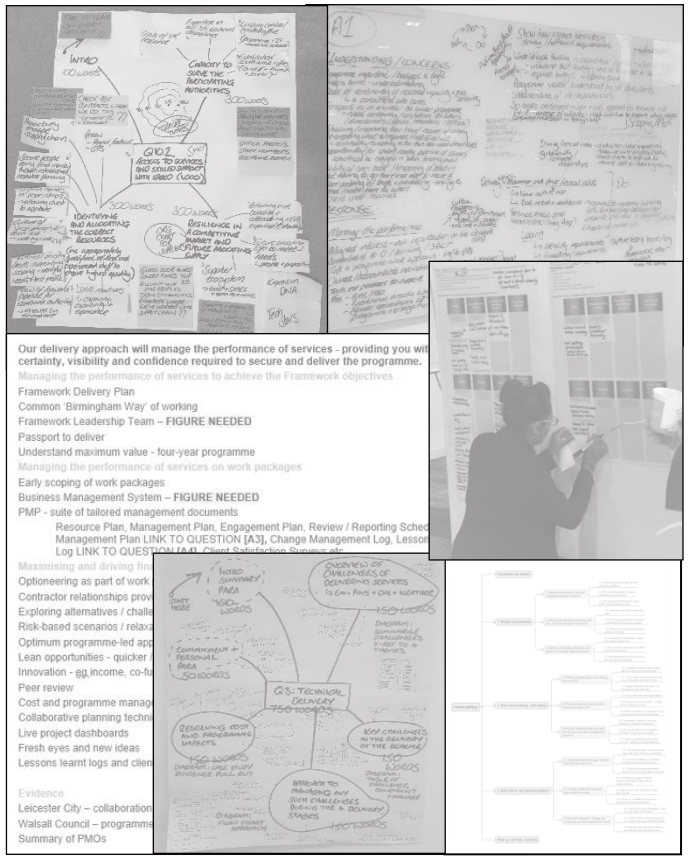
What else must we include or explain to maximise our score?

Can we work back from the submission date to create a programme?

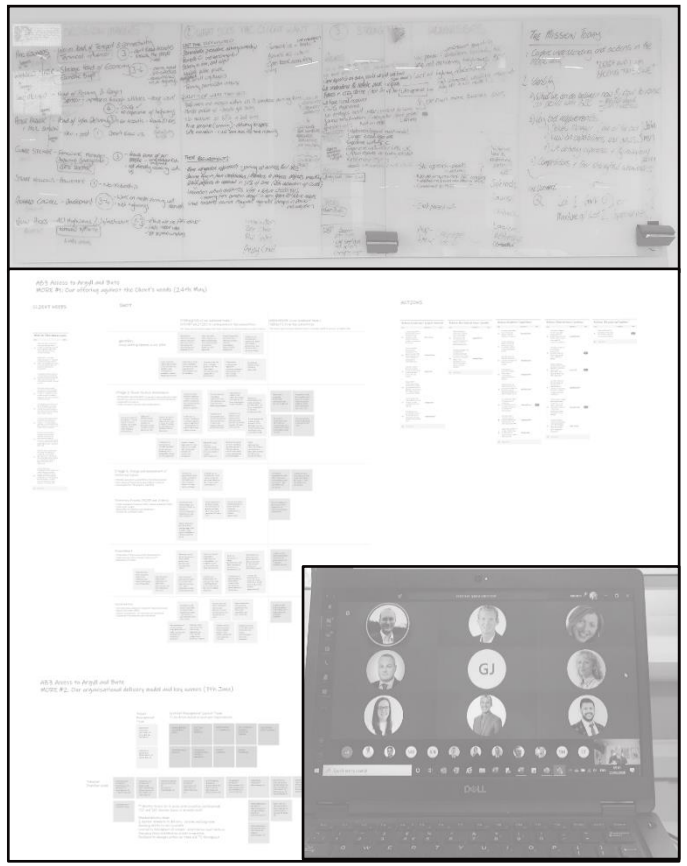
2.2 Take time to plan your answer before writing

Thoughts on answer planning

It’s the conversation that is important
Adopt a proportionate approach for your bid



Different minds work in different ways
It’s a plan – it doesn’t have to be beautiful



Don’t be put off by virtual working
Try Teams, MS Whiteboard, OneNote …

#3

Write clear, concise and compelling text

The narrative

We will confuse or lose the reader if they cannot understand or 'get' our story on their first pass

"We want to create an environment and platform whereby [Client] officers and [Consultant] staff can work together to develop the successful outcome of a project. To attain this, there may be projects which will benefit from a [Consultant] staff member working on a particular project spending a day or two a week working from [Client] offices. This is so that there can be transparent and effective brainstorming and discussions. This is dependent on the nature of the project. There are times where discussions with local officers will be beneficial to the development of a solution. It has been our experience that it is so much more effective to have those during the course of a working day rather than at a meeting as there are times when you remember a particular issue and can then just turn around and tell the team member. It also assists with the brainstorming. It does help understand local issues and concerns. It also builds effective communication between technical staff. This has been known to facilitate knowledge transfer."

170 words / 10 sentences

"We will create an environment in which [Client] and [Consultant] staff work together to deliver successful project outcomes. Where appropriate, we will co-locate in your offices to support collaboration and transparent communication. In our experience this builds a common understanding of local issues, encourages timely discussion and enables knowledge transfer."

49 words / 3 sentences

“Words are, in my not-so-humble opinion, our most inexhaustible source of magic”

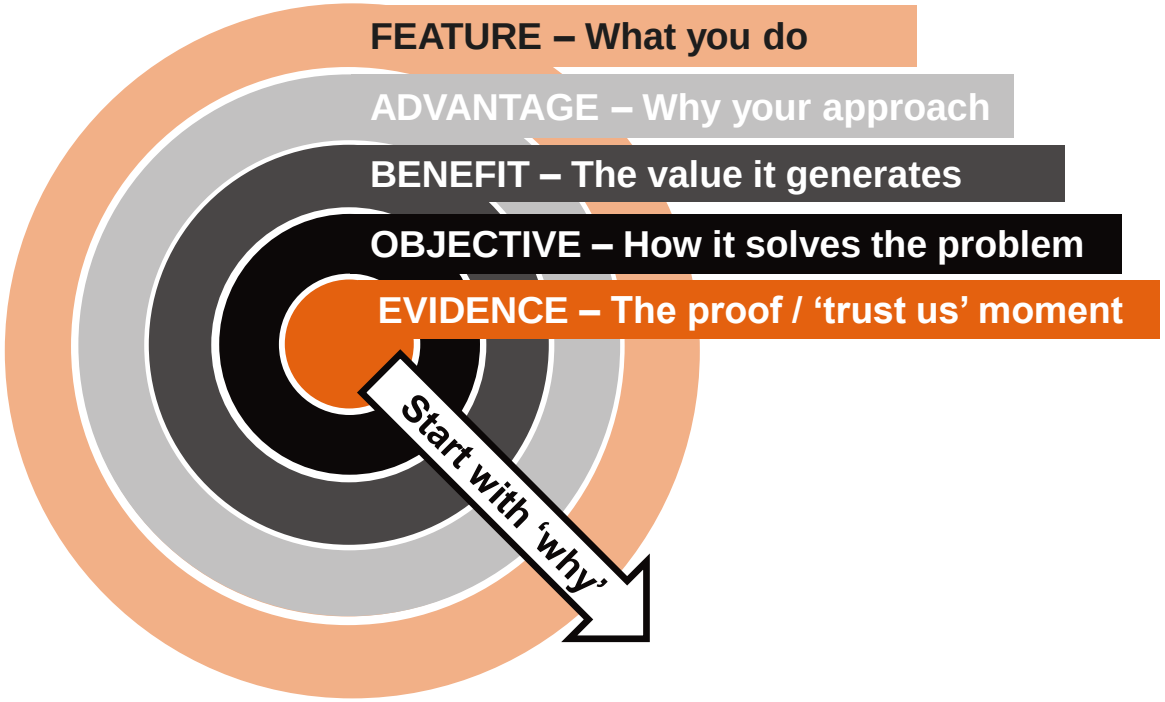
Albus Dumbledore
Harry Potter and the Deathly Hallows

The narrative

We will confuse or lose the reader if they cannot understand or ‘get’ our story on their first pass

3. Write clear, concise and compelling text

3.1 Avoid the ‘so what’ moment



3.2 Cut the fluff, guff, geek and weasel words

- **Words:** *Would you say that out loud if you were face-to-face?*
  A mix of long and short familiar words creates rhythm and pace
- **Sentences:** *Can you read that out loud in one breath?*
  Each sentence should be a unit of thought (20 to 25 words long)
- **Paragraphs:** *Does each form a bite-sized chunk on a theme?*
  Signpost the topic the paragraph contains in the opening line
- **Readability:** *Does the response look dense or like hard work?*
  Draw the reader in and make them want to turn the page

Thoughts on words

Ascertain	Find
Assist	Help
Commence	Start
Demonstrate	Show
Henceforth	?!
Initiate	Start
Necessitate	Require
Requirements	Needs
Sufficient	Enough
Terminate	End
Utilise	Use

Balance long subject-matter vocabulary with short alternatives for familiar words

… in the event that …	if
… despite the fact that …	Although
… due to the fact that …	Since
… the process by which …	How
… by virtue of the fact that …	Because
… as a result of …	Because
… owing to the fact that …	Because
… does not include …	Omits
… subsequent to …	After
… prior to …	Before
… in order to …	To

In-built phrases add little to our writing and can be replaced to help meet word limits

The design of the bridge was carried out by James … *(10 words)*

James designed the bridge … *(4 words)*

There were exhibitions in key locations before construction in which stakeholders were consulted … *(13 words)*

Exhibitions consulted stakeholders in key locations before construction … *(8 words)*

A similar project was undertaken by Arcadis' team using this approach … *(11 words)*

Arcadis undertook a similar project using this approach … *(8 words)*

Adopting the active voice ('who' doing' what') naturally leads to shorter sentences

#4

Include effective graphics and layouts

The visuals

Evaluators read multiple bids in a single day, each containing lots of ideas - it helps if we make key information easy to find

“I sometimes find, and I am sure you know the feeling, that I simply have too many thoughts and memories crammed into my mind”

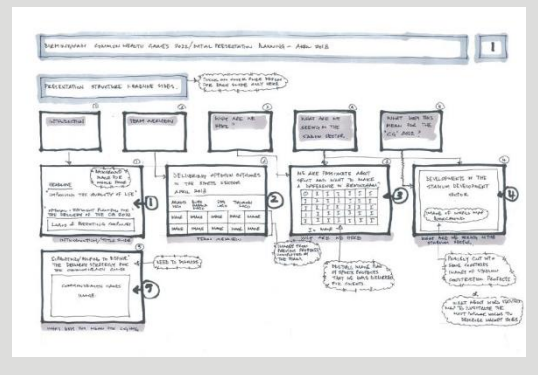
Albus Dumbledore
Harry Potter and the Goblet of Fire

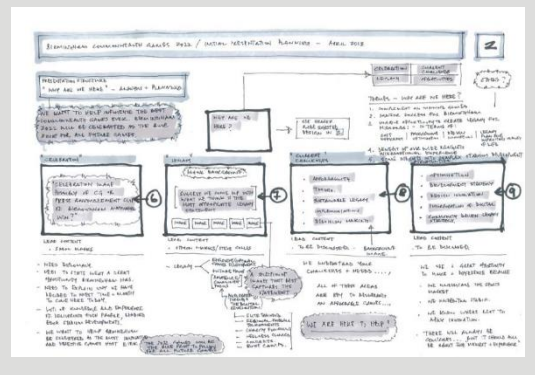
The visuals

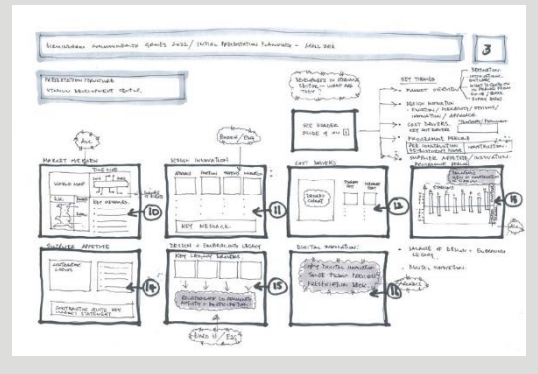
Evaluators read multiple bids in a single day, each containing lots of ideas - it helps if we make key information easy to find

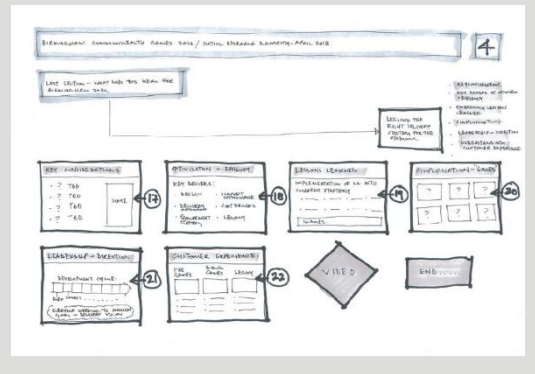
4. Include effective graphics and layouts

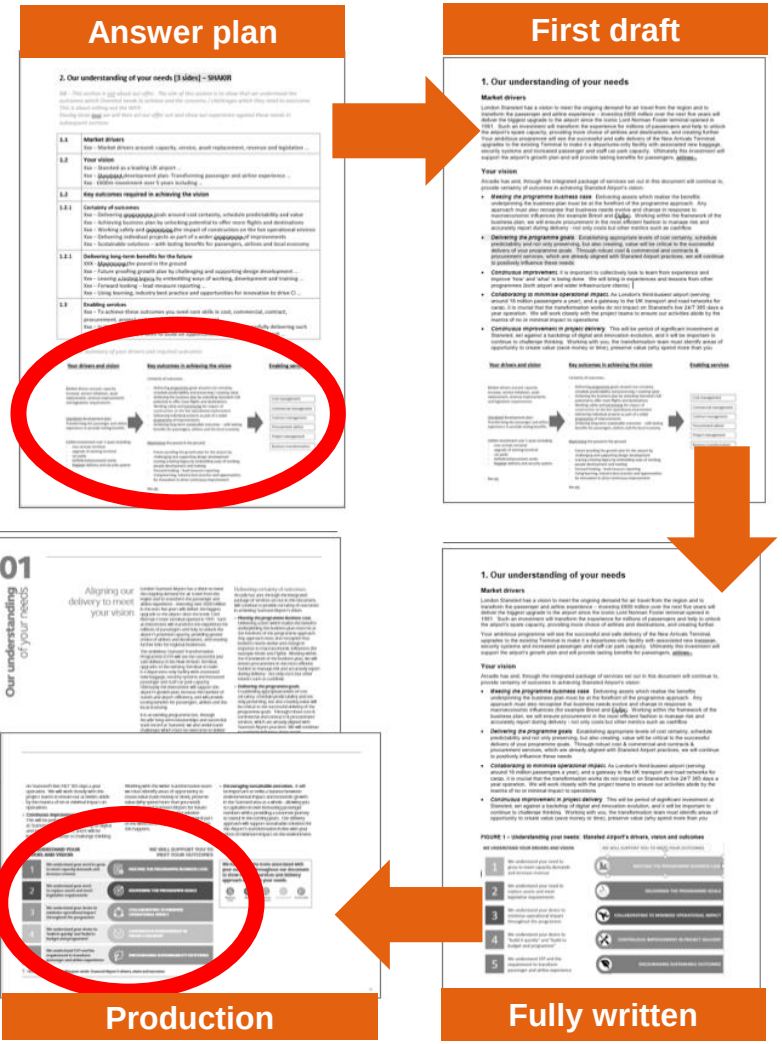
4.1 Think visually from the outset











4. Include effective graphics and layouts

4.2 Help the reader to navigate on the first pass

Design Services Framework (DSF)
ITT Storyboard

We have a mandate from our global business leadership that 100% of our relevant design projects shall be delivered towards BIM Level 2. We employ a global support network to ensure a consistent approach to pooled resources, best practice and innovation. In addition, we have strategic partnerships with the key vendors of Bentley Systems and Autodesk to leverage best value in access to design tools and training for our skilled Engineers and BIM modellers. Our UK BIM group cascades strategy and facilitates cross-sector collaboration, bringing benefit from experience in complex modelling, geospatial and data management.

We have specific Rail Sector KPIs to track BIM maturity and make targeted improvements in capabilities and implementation through a BIM community of practice.

Where we have worked in a coordinated manner facilitated by a Common Data Environment (CDE)

Our BIM implementation approach will build upon a legacy of successful projects. Major BIM enabled projects include: Manchester Victoria (Tekla BIM Award, 2015); Barking Riverside Extension (GRIP4/5 and 6-8) and Old Oak Common Stations (for TfL London Overground); Kings Cross Remodelling (for NR) as LDO GRIP3/4; Neasden Depot (for TfL London Underground) scheme and detail design;

On these projects, we integrated all rail engineering disciplines and collaborated closely with interfacing organisations. The design process benefits from working within the CDE in terms of management of geographically distributed teams; and with appropriate protocols, collaboration between organisations on a project is improved.

BIM Roles and associated responsibilities

We have employed the following roles in support of our BIM-enabled projects:

Our regional Rail Sector Business Units are supported by an Office BIM Manager with digital engineering leadership from Engineering Managers and Project Managers.

Our Contractor's Engineering Managers (CEM) are accountable for the Project Information Model (PIM) within the Common Data Environment (CDE) and in accordance with the standard "Engineering Management for Projects" NR-L2INI/02009. The CEM, in collaboration with the Contractor's Responsible Engineers (CREs), defines levels of detail and asset breakdown (appropriate to the GRIP stages) for translation into the project Task Information Delivery Plan (TIDP). The CEM defines the modelling and volumes strategy with the Project BIM Manager, who manages the BIM Execution Plan (BEP) and BIM processes.

On Multi-disciplinary projects each discipline appoints a BIM Coordinator, who assists the CEM and Design Manager in coordinating and integrating the disciplines in terms of programme, design integration and clash avoidance/detection.

To provide high-level coordination and a focus for best practice, we will appoint a Framework Information Manager and a Framework Digital Engineering Lead.

Our experience of the Common Data Environment

Since 2018 Arcadis Rail has delivered all projects that involve CAD outputs through a CDE, implementing the principles of the "BIM Level 2" suite of standards including the new ISO 19650 and the remainder of the PAS1192 suite. The CDE is the single source project information and facilitates collaboration between project teams and disciplines and, when configured with appropriate controls (such as those in BS EN ISO 19650-2) it helps to avoid duplication and mistakes.

We configure CDEs to facilitate information sharing and coordination at a level of sophistication and control appropriate to the scale and complexity of the project. .We have experience of working within client hosted CDEs for Network Rail and TfL and also have the capability to configure our own CDE for all projects.

Ownership of information within the CDE remains with the originator of that information. Information produced by different disciplines maintain clear authorship and remain separate. The liabilities of the originators are therefore not changed by the incorporation of their design information into a federated data-set. These principles are particularly important for delivery of multi-disciplinary design activities through this framework where we may work under a number of organisation models depending upon value, complexity and capacity of the DSF consultants.

5

Design Services Framework (DSF)
ITT Storyboard

For the Kings Cross Remodelling project (KXR), we administered the CDE on behalf of NR, employing the role of Information Manager (IM) as a gate-keeper of process, policing the CDE to ensure that design organisations followed agreed protocols and that the data was secure. As Lead Design Organisation, in addition to the role of IM we were also accountable for overall BIM coordination between design houses.

"I underestimated the extent to which technology can change forever the face of how our projects are run, changes which extend far beyond design & engineering processes. To see the transformation of how my teams now hold regular project catch -up meetings within a 3D Model talking about how to manage spatial conflicts poised within a future environment that's not yet built - rather than round a desk makes me think that projects will never be the same again." Robert Cairns - Route Delivery Director

For major projects the CDE may include a number of different information environments. Where we manage the CDE our core application for management and control of graphical design information is ProjectWise. Deliverables management of completed documentation, might be held outside in an EDMS such as Sharepoint or eB. Our latest configurations of PW, such as is configured to support Effage-Kier on HS2, facilitates deliverables and document management with similar workflows to those traditionally applied to CAD production. Alongside the ProjectWise element of the CDE we manage other data-sources such as geospatial information and project requirements to facilitate broader access to design and deliverables information .

Complex modelling

Single discipline

We recently supported Alun Griffiths (Contractor) Ltd with the development of tender submission AiP design for the design and build of the Gipsy Patch Lane bridge replacement, a supported by Network Rail to deliver road safety and public transport improvements. Timescales for delivery were limited and as such a fully coordinated approach to modelling and drawing production was required. By streamlining the process of producing drawings, updates were easier to provide to the contractor.

This way of working supported single-discipline design by allowing interfacing teams to work independently from each other with their outputs feeding into the federated model where checks on clashes and suitability were carried out. It allowed options to quickly be developed and reviewed against constraints, including assessment of a 4D construction sequence using Synchro

Figure 1 - Visualisation for Gipsy Patch Lane

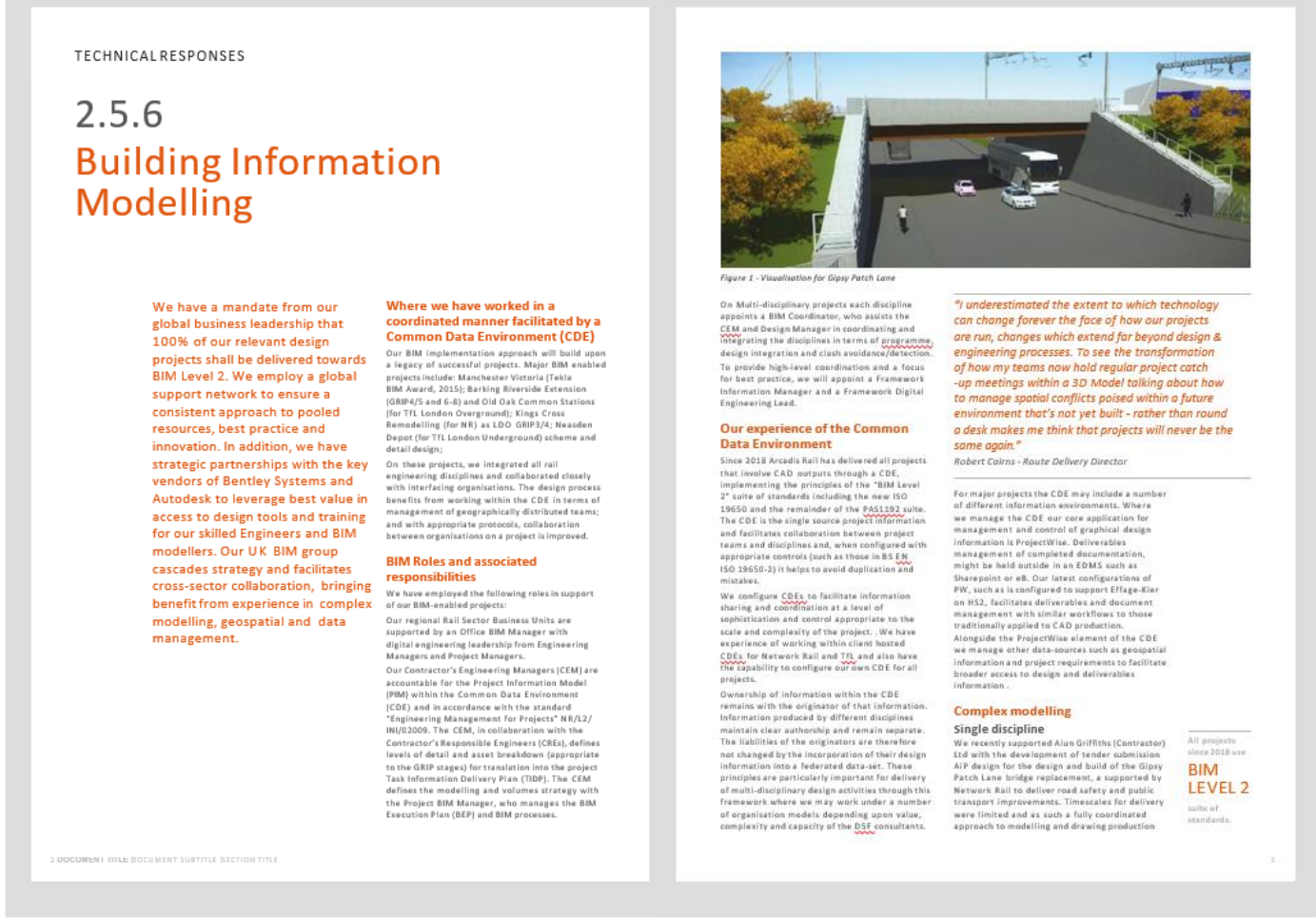
Model federation on multidisciplinary projects

Our work for TfL on the Barking Riverside Extension (BRE) represents a complete example of model federation on a multi-discipline project. Since 2016 we have completed scheme design through to detailed design and are now supporting the contracting JV through construction. The railway systems element of the works requires staged remodelling of the Ripple Lane sidings to facilitate access to a twin track spur carried by a new viaduct which terminates at the Barking Riverside station. The complexity of this project was managed through tight control of the modelling outputs by use of the Master Information Delivery Plan (MIDP) and TIDP. The model breakdown structure matched the asset breakdown structure for delivery, from primary maintainable asset through to its constituent parts. From the beginning of scheme design, the developing project information model was used to facilitate interdisciplinary design review, IDCs and hazard review workshops and informally as a point of reference for interfacing design discussions.

BIM Process and Assurance

We set BIM compliance and assurance through the BIM Execution Plan (BEP), in support of the Employer's Information Requirements; where there is not an EIR, we will develop an Information Requirements document that collects all such requirements from contract documents to provide minimum BIM Level 2 compliance. Our BEP levels of detail will be aligned to the stages of the design

6



TECHNICAL RESPONSES

2.5.6

Building Information Modelling

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2 DOCUMENT TITLE DOCUMENT SUBTITLE SECTION TITLE

Figure 1 - Visualisation for Gipsy Patch Lane

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All projects since 2018 use

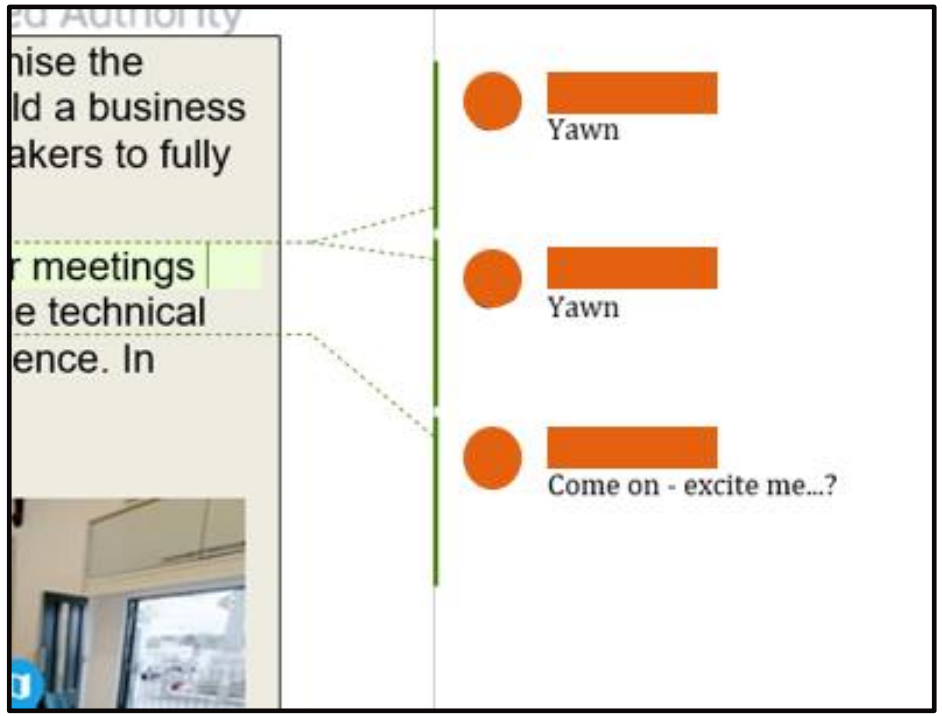
BIM LEVEL 2

suite of standards.

5

#5

Use reviews to add value and improve



Become the best

Reviews create tensions (quite often over personal preference) – our team's collective aim is to win

“Differences of habit and language are nothing at all if our aims are identical and our hearts are open”

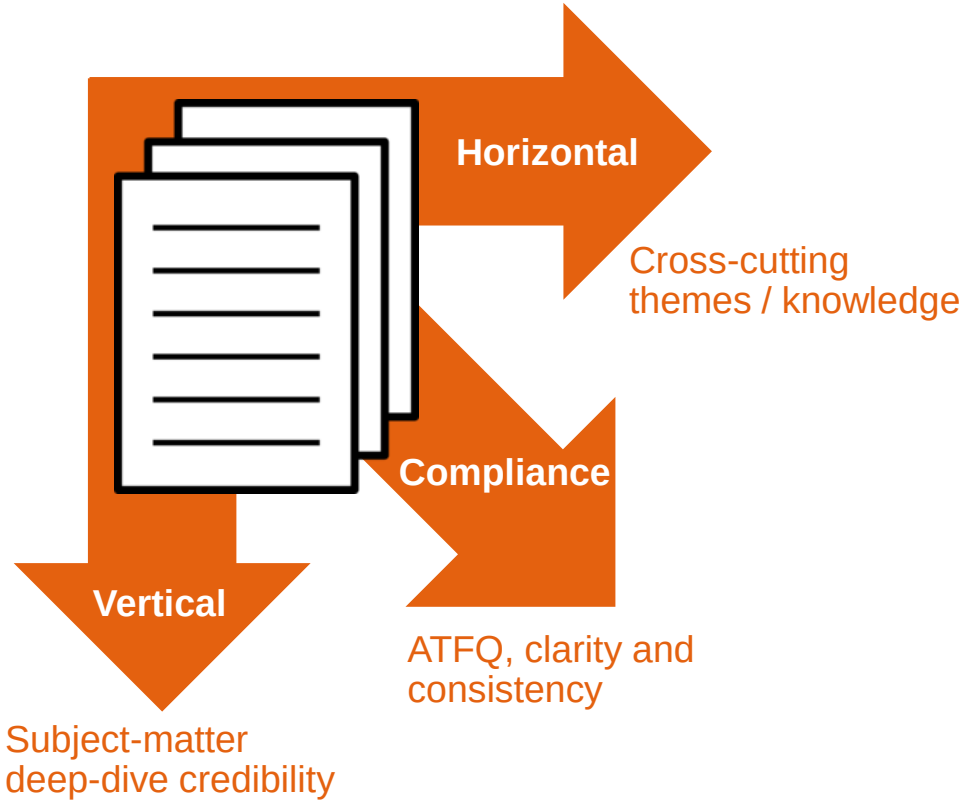
Albus Dumbledore
Harry Potter and the Goblet of Fire

Become the best

Reviews create tensions (quite often over personal preference) – our team’s collective aim is to win

5. Use reviews to add value and improve

5.1 Select a mix of reviewers



5.2 Be clear about the purpose of each review

- **Content plan:** Early check of the structure and compliance with requirements and scoring criteria before we start to write
- **First draft:** Seeing that a complete story is emerging - an opportunity to realign or seek help (whilst there is time to adapt)
- **Fully written:** Standing in the client's shoes to see that a clear and compelling offer is set out (also checking our commitments)
- **Final production:** A core team page-turn consistency check on writing, presentation and layout before signing-off for submission

Align author / review expectations at each stage

Right comments at the right time - maturing answers

Early challenges minimises rewrites

How to submit a winning bid

#1 Start with the recipient of the bid in mind – the reader

- Identify the decision makers
- Use SWOT analysis to build win themes

#2 Build a plan around the rules of the game – the storyboard

- Fully understand the bid requirements
- Take time to plan your answer before writing

#3 Use clear, concise and compelling text – the narrative

- Avoid the ‘so what’ moment
- Cut the fluff, guff, geek and weasel words

#4 Include effective graphics and layouts – the visuals

- Think visually from the outset
- Help the reader to navigate on the first pass

#5 Use reviews to add value and improve – become the best

- Select a mix of reviewers
- Be clear about the purpose of each review

“There’s always room for a story that can transport people to another place”

J.K. Rowling

“Happiness can be found in the darkest of times, if one only remembers to turn on the light”

Albus Dumbledore
Harry Potter and the Prisoner of Azkaban

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