

# Rebid Proposal Checklist

Six things to look for when reviewing rebid proposal documents

## CHECKLIST





## Introduction

There are any number of checklists for reviewing new bid proposals. Here are some of the things we also check for when we are reviewing rebid proposals for incumbents. As with all rebids, we check the basics you would for any good new business bid, but we also look for these areas:

### ✓ **Compliance**

Yes, this is a standard you would use for any bid. But there is good reason we particularly check for compliance in rebids. Some incumbents feel they know the details of the contract so well they answer the questions set based on their knowledge of the contract, not on the specific question asked or specification set. Even if they are right and have come up with a superior solution, if they aren't compliant they can still lose marks with evaluators, or even have their bid rejected. If you find this problem in your rebid, perhaps you would have benefited from influencing the rebid specification earlier. Or perhaps you can use a clarification question to get the spec or question altered to reflect what you see as the reality of the contract. If not you need to answer the question and specification as it is set – even if it is 'wrong'. Perhaps you can also put in an alternative solution. But only in addition to a compliant one if you don't want to risk losing marks.

### ✓ **Use of evidence from the contract**

Rebid proposals need balance. Too much emphasis on your existing contract delivery can read as a lack of innovation and fresh thinking, or 'business as usual'. But sometimes we read PQQs / RFIs and ITTs/ RFPs from incumbents which barely mention the fact they are the incumbent. They don't draw on their knowledge of the customer and contract to evidence how their solution is a good fit for the customer and don't use the (hopefully) high levels of performance they have delivered on the existing contract to give the customer confidence they are the right choice for the next contract.

Sometimes this can be because the team writing the rebid don't know the contract performance – they haven't properly engaged with the operations team. Sometimes there is an assumption that the customer knows the incumbent's performance and it doesn't need repeating in the proposal. It does. The evaluators might not know the contract either, and in most cases they can only give marks for what is actually written in the proposal – even if they do 'know' the incumbent's great performance to date.

### ✓ **Use of evidence to support the new solution**

This is a 'next step' from the above checklist point. Once we can see evidence being used from the existing contract we look to see how this evidence of knowledge and past performance is being used to inform the new solution. Just telling the customer you did a great job in the last contract isn't really enough. You need to convince the customer your



performance will continue (and ideally improve) in the next contract. And we ideally want to see knowledge of the customer and existing contract being clearly shown to be influencing improvements to the new contract.

For example if the incumbent knows average weekly volumes vary from day to day during the week we want to see how the solution reacts to meet these variations – and ideally we want to see the data from the existing contract included as evidence, together with a clear justification as to why these variations are likely to continue in the next contract period. This is the sort of detail the competition might not have. Not only does it show the incumbent's solution is more responsive to the customer's real needs (whilst still being compliant of course) and the incumbent has learnt from the contract it can, evidenced properly, put a question in the mind of the evaluator about the competitors' solutions.

### ✓ **Recognition of the customer's culture and strategic goals**

Understanding the customer's culture and the strategic context of the contract should be one of the advantages the incumbent has – together with being able to show they can work in a way which fits in with the customer's culture and helps the customer meet their wider goals. Customers expect incumbents to have learnt this during the contract. We ideally want to see it reflected in the proposal.

### ✓ **Recognition of changes in the new contract compared to the existing one**

Even if the customer has not changed the specification from the previous bid, the market, technology and best practice will have moved on, demanding a reaction from the incumbent's solution. Much more usually the customer has changed the specification and form of the new contract. The changes could be radical or more subtle, but whatever the level of change the incumbent must be recognising the changes and addressing them in their solution. The incumbent needs to emphasise this recognition and reaction to changes more than a challenger to overcome any fears in the evaluator's mind that they are focusing on 'business as usual'. When we work with incumbents prior to the bid writing phase we usually ask them to list two sets of changes they need to address in the rebid: firstly the external changes in technology, competitor's approaches, best practices; secondly the changes the customer has asked for, both in their pre rebid conversations and specifically changes from the customer's rebid documentation. We regularly go back to these lists as the rebid is being written to ensure each item is being addressed, and as we review the written rebid we again check all have been clearly covered.

### ✓ **Innovation**

We want to see how much is genuinely new in the incumbent's solution. Ideally during the rebid preparation stage they will have completed a 'ground up' or as we call it 'Green Field' solution review which ignores all the existing assumptions from today's contract and focuses only on creating a solution delivering what the customer is now asking for in the future. Even



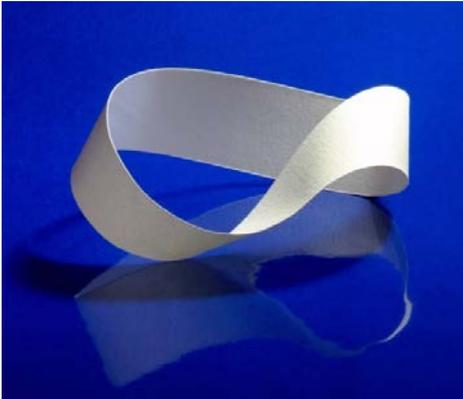
if this hasn't been done we still want to see real innovation and new (relevant) elements in the rebid solution. This is the flip side of finding the balance between use of knowledge and performance from existing contract we covered above and offering a fresh, new approach. On a simple level we look to see what proportion of the solution benefits, discriminators and differentiators are based on new ideas vs those from the existing contract. And we want to see evidence of these new ideas from outside the existing contract experience (perhaps from other contracts, industry data or other work). The exact balance between innovation and experience will vary from rebid to rebid, but there has to be a real balance of some sort. The competition will be emphasising change, innovation and fresh approaches, the incumbent mustn't fall into the trap of (only) being the safe option.

## Summary

There are of course other things we look for when reviewing rebid documents, including all the standards such as clarity of benefits and discriminators, customer focus, high quality writing and presentation as well as others such as effective use of the risk of change. But the list above are those we go to first as they are the most common, and often easily fixed, pitfalls we observe in incumbents' rebids.

Of course the best rebids are those where all the information is already available to the writers about the (hopefully great) performance on and experience of the contract, and when the incumbent has completed a full rebid preparation process. But even if it's too late to do this and you are in the latter stages of reviewing your rebid documents you can still make a difference. Take a look at some of your rebids and use our headings to check whether you are making the most of your incumbency, and where you might be able to make some simple adjustments to improve your chances of success.

*This paper summarises some of the areas we cover in detail in the Rebid Guide and the Rebid Centre. Both contain 'how to' tools and techniques to help you are prepare for the rebid so you are in the best position before you start writing. They also give detailed advice and tools to use when writing your rebid documents to make the most of all the areas we have covered in this checklist.*



Rebidding Solutions helps incumbents win their rebids. As well as providing articles, advice and processes for incumbents in the Rebid Centre we have also published the Rebid Guide which contains 60 ideas for incumbents to put into practice from day one of their contract to improve their chances of winning their rebid. We also provide consultancy and bespoke training for incumbent companies and contracts, helping them put together the processes and actions that lead to rebid success.

For an overview of all our services visit our website at [www.rebidding.co.uk](http://www.rebidding.co.uk) and sign up to our free newsletter giving hints and tip what to do to win your rebid.