

PAS 360:2023

Bid and proposal management – Code of practice



Currently in preview, click buy full version

Publishing and copyright information

The BSI copyright notice displayed in this document indicates when the document was last issued.

© The British Standards Institution 2023.

Published by BSI Standards Limited 2023.

ISBN 978 0 539 22887 8

ICS 03.100.10; 03.100.01

No copying without BSI permission except as permitted by copyright law.

Publication history

First published October 2023

Contents

| | |
|--|-----------|
| Foreword | ii |
| 0 Introduction..... | iii |
| 1 Scope..... | 1 |
| 2 Normative references | 2 |
| 3 Terms, definitions and abbreviations | 3 |
| 4 Bid and proposal management..... | 6 |
| 5 An introduction to bid and proposal management function principles... | 9 |
| 6 Bid and proposal management principles | 11 |
| 7 Implementation..... | 27 |
| Annexes | |
| Annex A (informative) Roles and responsibilities | 30 |
| Annex B (informative) Example vision and plan contents..... | 32 |
| Annex C (informative) Example process levels | 33 |
| Annex D (informative) Example opportunity qualification business case | 34 |
| Annex E (informative) Example bid and proposal management function business case and implementation plan contents..... | 36 |
| Bibliography | 37 |
| List of figures | |
| Figure 1 – Business development and delivery lifecycle | iv |
| Figure 2 – Bid and proposal management at a function (strategic) and opportunity (tactical) level | 6 |
| Figure 3 – The five pillars of bid and proposal management..... | 9 |
| Figure 4 – Bid and proposal management function maturity model | 10 |
| List of tables | |
| Table B.1 – Example vision and plan contents..... | 32 |
| Table C.1 – Example process levels and respective details | 33 |
| Table D.1 – Example opportunity business case contents..... | 34 |
| Table E.1 – Example bid and proposal management function business case and implementation plan contents | 36 |

Foreword

This PAS was sponsored by Association of Proposal Management Professionals (APMP). Its development was facilitated by BSI Standards Limited and it was published under licence from The British Standards Institution. It came into effect on 30 October 2023.

Acknowledgement is given to Bid Craft Ltd, particularly Gareth Earle, as the technical author, and the following organizations that were involved in the development of this PAS as members of the steering group:

- APMP United Kingdom Development CIC
- BidCraft
- Donoma Advisors
- Energy & Utility Skills
- Institute of Sales Professionals
- East Riding of Yorkshire Council on behalf of Local Government Association
- Make UK Defence
- Satellite Applications Catapult
- Siemens Rail Infrastructure
- White & Case

Acknowledgement is also given to co-opted members of the Steering Group, together with the members of a wider review panel who were consulted in the development of this PAS.

The British Standards Institution retains ownership, and copyright of this PAS. BSI Standards Limited as the publisher of the PAS reserves the right to withdraw or amend this PAS on receipt of authoritative advice that it is appropriate to do so. This PAS will be reviewed at intervals not exceeding two years.

This PAS is not to be regarded as a British Standard. It will be withdrawn in the event it is superseded by a British Standard.

The PAS process enables a code of practice to be rapidly developed in order to fulfil an immediate need in industry. A PAS can be considered for further development as a British Standard, or constitute part of the UK input into the development of a European or International Standard.

Information about this document

This publication can be withdrawn, revised, partially superseded or superseded. Information regarding the status of this publication can be found in the Standards Catalogue on the BSI website at bsigroup.com/standards, or by contacting the Customer Services team.

Where websites and webpages have been cited, they are provided for ease of reference and are correct at the time of publication. The location of a webpage or website, or its contents, cannot be guaranteed.

Presentation conventions

The provisions of this PAS are presented in roman (i.e. upright) type. Its requirements are expressed in sentences in which the principal auxiliary verb is “should”.

Commentary, explanation and general informative material is presented in smaller italic type, and does not constitute a normative element.

Where words have alternative spellings, the preferred spelling of the Shorter Oxford English Dictionary is used (e.g. “organization” rather than “organisation”).

Contractual and legal considerations

This publication has been prepared in good faith, however no representation, warranty, assurance or undertaking (express or implied) is or will be made, and no responsibility or liability is or will be accepted by BSI in relation to the adequacy, accuracy, completeness or reasonableness of this publication. All and any such responsibility and liability is expressly disclaimed to the full extent permitted by the law.

This publication is provided as is, and is to be used at the recipient's own risk.

The recipient is advised to consider seeking professional guidance with respect to its use of this publication.

This publication is not intended to constitute a contract. Users are responsible for its correct application.

Compliance with a PAS cannot confer immunity from legal obligations.

0 Introduction

0.1 General

For organizations to be successful, it is necessary that they balance sustaining and growing their business by winning contracts to supply goods/products/services/works with simultaneously delivering existing contract responsibilities. Accordingly, there is a need to win business efficiently and in a cost-effective manner, making the best use of the resources available, to achieve the best possible solution. Pursuing business is complex. It might involve bidding for new work, rebidding for an existing contract or bidding to secure a place on a framework. It might also involve investing in pursuing an opportunity before the invitation to tender is published by the client/customer/funder, and as well as submitting a proposal, it might require post-submission presentations, negotiations or responding to proposal clarifications from the client/customer/funder.

0.2 The purpose of bid and proposal management

The purpose of bid and proposal management is to achieve the submission of a proposal by a given deadline to provide goods/products/services/works that is capable of acceptance, competitive, deliverable and viable. The proposal is usually presented in the form of a document or presentation that needs to persuade the recipient to act in favour of the bidding organization by being both responsive and compelling. This can increase the likelihood of winning or retaining a contract.

0.3 The benefits of a bid and proposal management function

Using good practices is only one element of being efficient and effective in bidding; having a holistic bid and proposal management function that does not just focus on the output, i.e. the proposal, means an organization consistently has a stronger likelihood of winning or retaining a contract. An emerging, established, embedded, and enhanced function provides an organization with a standardized clear and consistent approach to respond to client/customer/funder requirements in a way that:

- a) is tailorable according to the size and complexity of an individual opportunity;
- b) is time and resource efficient;

- c) enables innovation;
- d) provides risk mitigation for both suppliers and procurers; and
- e) optimizes the likelihood of success, resulting in improved win rates.

This not only supports the pursuit of individual opportunities, but also establishes, embeds, and enhances repeatable ways of working that make use of lessons learnt from multiple opportunities. Adopting this approach matures the function so organizations become more efficient and effective by spending more time bidding proactively than reactively. This enables the bid and proposal management function to work collaboratively with other business functions in a 'one team' approach enabling diverse perspectives to be taken into account and allows more time to develop more innovative and better solutions, thinking, and outcomes through continuous improvement.

By recognizing the holistic importance of bidding beyond the process of developing and submitting proposals, so it bids to deliver, not just to win, an organization acknowledges the significance bid and proposal management has in its sustainability and future growth.

Through an emerging, established, embedded, and enhanced bid and proposal management function a range of benefits can be realized for the organization, its employees, and its clients/customers/funders. Many of these benefits are the result of greater consistency and standardization delivered through more robust bid and proposal management. They can be tangible or non-tangible, as well as monetary or non-monetary. Such benefits include:

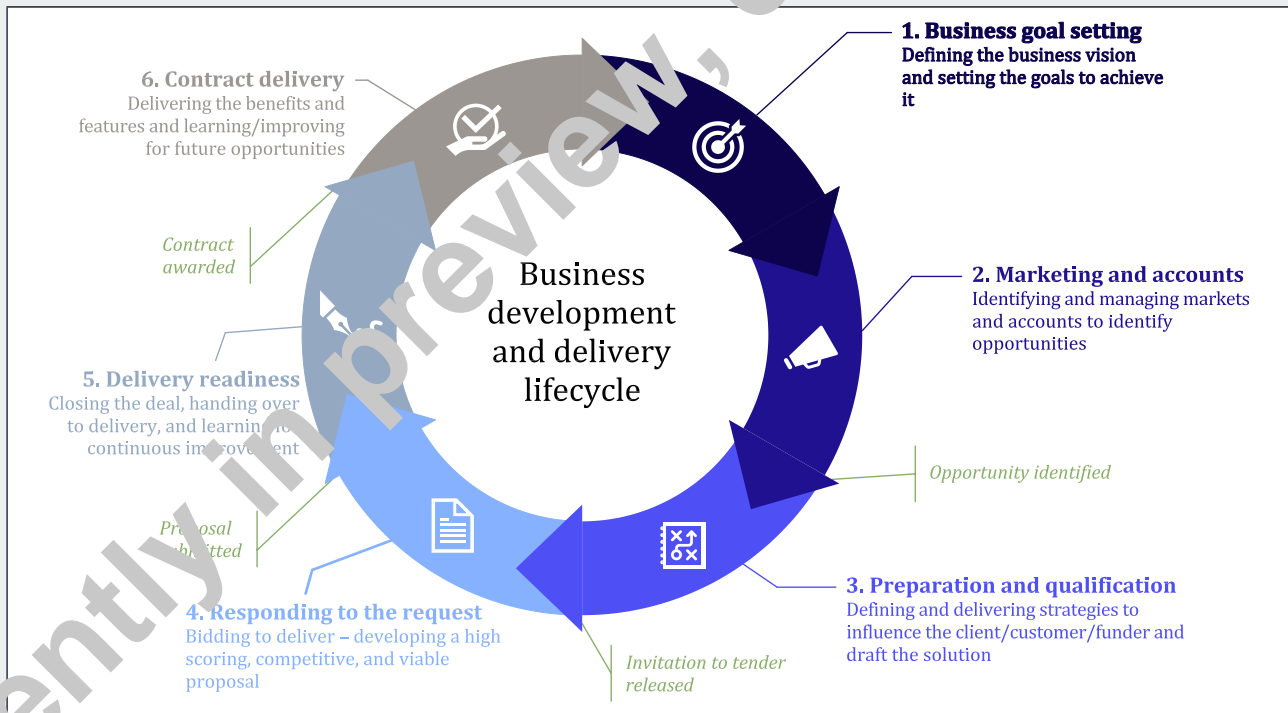
- 1) improving efficiency and productivity;
- 2) optimizing costs of bidding;
- 3) higher scoring proposals;
- 4) bidding on opportunities that deliver on business strategic goals rather than just trying to meet a financial target;
- 5) identifying and sharing potential new business areas to pursue with other business functions, including sales and business development;
- 6) improving business sustainability and growth;

- 7) winning more contracts;
- 8) winning higher value contracts;
- 9) maintaining or increasing profitability;
- 10) improving wellbeing of staff and reducing turnover;
- 11) providing staff with structured career development and learning opportunities;
- 12) developing new concepts as part of a research and development roadmap;
- 13) working closer with clients/customers/funders;
- 14) improving collaboration with partners and suppliers; and
- 15) reducing contract delivery risk.

0.4 Business development and delivery lifecycle context

The pursuit of opportunities and subsequent delivery of contracts can be complex for organizations, with all parties involved needing to work collaboratively to create solutions that meet the client/customer/funder needs and the organization’s goals throughout the process. As is illustrated in Figure 1, bid and proposal management is a fundamental part of the business development and delivery lifecycle, which includes the client/customer/funder (procurement and benefit realization) and supplier organization (business development/sales and contract delivery). A number of business gates throughout this lifecycle helps an organization confirm that they are focusing on the right markets, pursuing the right opportunities, developing high-scoring and client/customer/funder influencing proposals, closing the deal, and delivering the benefits and features as have been proposed and agreed. To be effective, the bid and proposal management function has a presence in each of the lifecycle stages. The level of its presence might vary depending on the stage, as by the nature of the function its level of involvement in Stage 3. Preparation and qualification and Stage 4. Responding to the request for quotation in Stage 6. Contract delivery.

Figure 1 – Business development and delivery lifecycle



To support the organization achieve its goals by working collaboratively with other business functions, the bid and proposal management function establishes how it might operate at a functional and opportunity level across the lifecycle. This results in efficiencies when delivering the activities required in each of the major phases of the business development and delivery lifecycle.

0.5 The role of PAS 360

As a code of practice, this PAS is focused on the bid and proposal management business function rather than “how to” bid individual opportunities. It does this by introducing the five pillars of bid and proposal management (see 5.1), which concentrate on the key elements of bid and proposal management, and how they can be implemented by organizations to develop a mature function (see 5.2) that supports their current and future organization goals.

This PAS aims to benefit organizations engaging in bid and proposal management through the emergence, establishment, embedding, and enhancement of a bid and proposal management function, leading to increased win rates and the likelihood of success. The implementation of PAS 360 could help organizations to:

- a) bring consistency and rigour to the way in which an organization pursues opportunities, bringing cost and operational efficiencies;
- b) use business governance to reduce the risk that a contract is undeliverable or requires resource beyond the budget to deliver the contracted outputs/outcomes, putting the organization at technical, commercial, financial and/or reputational risk;
- c) use bid and proposal processes and practices, which are communicated to all engaged participants;
- d) be included earlier in the pursuit of opportunities to qualify and prioritise the most desirable and winnable opportunities by working proactively with internal and external stakeholders to identify solutions that offer most value;
- e) ensure all relevant business stakeholders are engaged in the pursuit of an opportunity, including increasing the engagement with other business functions, such as the delivery team, to secure their active engagement in the bid development process, so the organization bids to deliver, not just to win;
 - 1) select the best available team of skilled and competent people who can add a diverse perspective to pursue an opportunity;
 - g) create successful strategies to win business (new or existing);
 - h) enable bid teams to have the time to create the best possible solutions and outcomes to benefit both the organization and the client/customer/funder;
 - i) identify, assess, and implement lessons learnt as part of an established continual improvement process for the benefit of opportunities across an organization; and
 - j) develop a bid and proposal management capability and competency through an established career and professional development path, which can result in more engaged, productive, skilled, knowledgeable, and experienced subject matter experts in the bid and proposal management profession.

As the delivery of bid and proposal management is a business function, an organization does not have to employ individuals with bid and proposal management in their job title for this PAS to be applicable.

Furthermore, the implementation of this PAS is tailorable and therefore applicable to all companies, regardless of size and bid and proposal management function maturity. The bid and proposal management function maturity model (see Figure 4) has flexibility and scalability built into it, meaning PAS 360 supports:

- 1) start-up and scale-up organizations with emerging bid and proposal management functions by giving guidance on what needs to be taken into account when establishing and embedding a function;
- 2) established organizations get assurance on their bid and proposal management function or discover where already embedded functions can be enhanced; and
- 3) organizations going through the process of merger and acquisition collaborate to deliver stronger bid and proposal management functions by reflecting collective expertise into a single function.

The PAS also helps organizations with a single individual managing bids and proposals as well as those with large teams, as it provides guidance and support to identify a target operating model for their bid and proposal management function, create a business case to achieve the target operating model, and implement it for the benefit of the entire organization.

By implementing the principles of PAS 360, organizations' contract delivery teams play a greater part in the creation of a solution for a client/customer/funder during the bidding phase of the business development and delivery lifecycle. This results in a more efficient delivery of the contract.

Furthermore, client/customer/funders can be more confident that an organization implementing PAS 360 is more likely to submit a more trustworthy proposal because of it having clear practices in place that have the right people involved at the right time in the development, review, sign off, and submission of a solution and proposal. This results in a higher likelihood of the contract being delivered on time, to budget, and meeting the expected quality to deliver the required goods/products/services/works.

1 Scope

This PAS provides recommendations for establishing good practice for the delivery of a bid and proposal management function. It covers good working practice, roles, and responsibilities.

It is intended for use by organizations, regardless of type, geographical location, size of business or the nature of its activities, tendering to supply goods/products/services/works to government contracting authorities, other similar regulated industries, and non-government commercial procurers.

It is intended for use by leaders and managers in employing organizations, and those charged with delivering bid and proposal programmes.

It is not intended to provide guidance on particular products or services, or procurement-specific activities delivered by the procurer. It is not intended to recommend proprietary methodologies, processes, or techniques an organization implements as part of its bid and proposal management practices.