

## Before you write your next tender or proposal ...

By Linda Julian

### Some tips to improve your probability of success

Increasingly, legal practices are being asked to prepare competitive tenders and proposals to obtain work from new clients or continue relationships with established clients. At times, considerable effort is expended in bidding for work where the probability of winning work is either remote or non-existent. These tips will help you to win work through tender and proposal processes.

#### Before bidding:

- Critically evaluate the strategic position of your firm in relation to any particular bid, pitch, or tender.
- Understand your positioning apropos competitors in this market segment.
- List strengths and consider weaknesses of what you can offer.
- Assess the probability of winning the business if you proceed to bid.
- Work out exactly what you need to do to maximise your probability of success.
- Prepare for tender and proposal processes ahead of time: get CVs up-to-date, write up service descriptions, etcetera.

#### The next step is to ensure you are on the invitation list. Be sure to:

- Assess all the options open to you in obtaining the opportunities you want to tender, bid, or pitch.
- Coach your team in this area of business development.

#### When the Request for Proposal (RFP) or Request for Tender (RFT) is received, you need to quickly:

- Identify the issues to be addressed.
- List items requiring clarification from the prospective client.
- Allocate responsibilities for collecting data, assembling material, and preparing for the response.
- Formulate an appropriate pricing strategy.
- Design and document appealing and effective work processes, service descriptions, and quality checks.
- Start work early on preparing your response.
- Proofread and perfect expression, formatting, presentation, layout, cohesiveness, and the commercial attractiveness of your response.
- Tightly execute document production.
- Ensure timely delivery.

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**When you are invited to an interview or discussion about your tender, you need to be prepared.**

- Get some coaching in and rehearse for the session.
- Conduct workshops to ensure that you deliver your best possible performance on these occasions.
- Debrief post-interview.

**During pre-engagement negotiations:**

- Critically reassess the business opportunity and value of the work.
- Identify desirable modifications to work practices and processes, service descriptions, deliverables, and/or culture.

**After the tender process, successful or unsuccessful:**

- Conduct a workshop on outcomes from the tender, appropriate responses, and what can be learnt from the process.
- Conduct a workshop on outcomes from the tender, appropriate responses, and what can be learnt from the process.
- Identify areas for improvement prior to the next bid or pitch.
- Integrate the new work methods into the practice.
- Develop a client care regime for your newly-acquired client.

**About the author**

Linda Julian is acknowledged as a leading authority on strategic practice development and how to win business for law firms. Since 1979, she has consulted with lawyers and other professionals throughout Australia, New Zealand, the Pacific, and Asia on a wide range of business acquisition, client retention, and strategic management issues.

Her book *The Passionate Professional: creating value, success, and prosperity* has sold in 13 countries and has received wide acclaim. Linda lectures in strategic management and marketing professional services at post-graduate level. She leads the small and highly specialised Julian Midwinter & Associates consulting practice.