



G-Cloud 15 Service Definition Document - Bid Management as a Service (BMaaS)

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1. Background

Impart is a training and consultancy organisation that specialises in providing bid and grant application support, consultancy and training services to public and private sector clients across multiple sectors, helping them adopt a more strategic, proactive and structured approach to their business development and commercial activity. Our experienced staff and best practice approach allow us to provide the support you need to maximise your business success.

We operate across all public sectors, including central government, local government, healthcare and emergency services, and can flex our services around customers' in-house capacity/capabilities.

While most public sector organisations deliver innovative and life-impacting services, they're not always as successful as they would like to be with tenders. Therefore, with a 90%+ win rate and a highly flexible service model, we can provide the necessary support to give an organisation's success levels a significant boost.

Effective resource utilisation is difficult to achieve due to the variable nature of these activities, leaving bid management teams over and under-utilised, often impacting the quality of responses. That's why we provide a highly flexible and bespoke service, capable of meeting the demands of the tender/grant application process, adding/removing resources as required to ensure cost-efficient support. We have worked on highly complex bids worth in excess of £4Bn, so have the capability to support the most demanding tenders.

We've successfully applied our best practice approach across all major industries and sectors, working with bid teams of all sizes and skillsets. So, whether you're a Council, Trust or central government department looking for end-to-end bid management or ad-hoc help, we can provide the support you need.

Many public sector organisations have benefited from the engagement of our team members in supporting their business development activity. Our experience across a wide variety of sectors adds value to in-house management teams, and we have provided many bespoke services including the production of digital transformation strategies, developing client management teams through mentoring, training and business tools, and implementing business development governance and processes.

Testimonials

Yorkshire Ambulance Service:

"Following the loss of an existing Patient Transport Service (PTS) contract, we were introduced to Impart who provided us with detailed feedback on our submission and identified areas of improvement. We have worked closely with Impart on numerous successful tenders since, applying their feedback and recommendations, and utilising their best practice bid process.

Our in-house bid management and writing team, importantly, as well as subject matter experts (SMEs), have also received training from Impart in writing winning responses and bidding best practice, helping us to become more self-sufficient and aware of the awarding criteria within the bidding process.”

Leeds City Council:

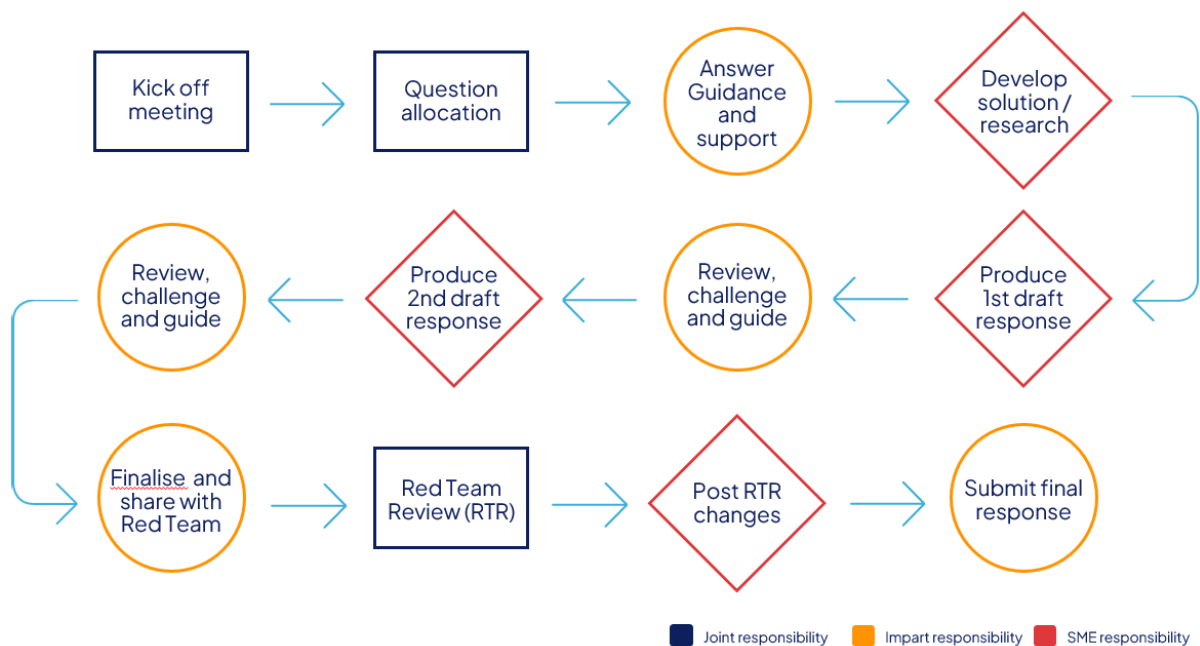
“We first engaged Impart’s services when we, as part of the Yorkshire and Humber-wide collaboration, were bidding for Local Health and Care Record Exemplar funding to support the greater integration and sharing of patient data across the region. Impart supported us throughout the multi-phase bidding process that included both the initial submission and subsequent Key Lines of Enquiry clarifications.

Throughout the process they brought discipline and provided bid writing education and development to the team. With their support, we were subsequently awarded one of the five first wave pilots (£7.5m grant), which was a huge success for the Council and the Yorkshire and Humber region as a whole.”

2. Bid Management as a Service (BMaaS) – Fully managed tender, grant and business case support services

Impart has extensive experience of working closely with our public sector customers’ in-house teams, both on an ad-hoc and secondment basis.

Operating closely with Subject Matter Experts (SMEs) and applying our best practice bid process, we consistently produce high-quality, compliant and compelling winning bids. An overview of our process is included below. Where required, this can be adapted to ensure it fully aligns with the customer’s internal process and governance requirements:



Impart can support each of the key stages of the bid process with the following activities. Our specific role can be agreed on a bid-by-bid basis:

Pre-publication of the tender

Prior to the tender being published we can work with you to plan and prepare for its release, for example in supporting the development of the win strategy, reviewing / optimising bid library content, developing a draft timetable, identifying supporting data / content that will be required (e.g. evidence of performance) and training / upskilling the team e.g. training workshops.

Pre-kick off / admin

We can manage the bid portal on your behalf, submitting clarification questions, distributing clarification logs / messages and uploading / submitting the final response.

Your SMEs will be asked to prepare feedback for the kick-off meeting regarding any aspects of the specification / documentation that:

- Causes them concern
- Will cause other bidders concern, giving us an opportunity to differentiate ourselves
- We can exceed the stated requirement at little / no cost (value add)

They will also be asked to highlight any clarification questions they would like to submit.

During this initiation phase, Impart will also undertake a comprehensive review of the documentation and produce a bid plan, including the following key activities / milestones:

- Kick-off meeting
- Circulate response templates to SMEs / stakeholder(s)
- Various draft response deadlines
- Circulate the peer review response
- Peer review
- Tender submission / document sign-off

Kick off

Impart will meet with your bid / project team to launch the bid. We will provide them with a common understanding of the opportunity, how as a team we will approach it and what is required over the coming weeks. The agenda typically includes:

- The procuring organisation's key requirements
- Bid documentation feedback from each team member
- Identification of any required clarification questions (continually reminded throughout the clarification window)
- An overview of the proposed service / solution
- Your relationship with the procuring organisation
- The likely competition
- Finalise the win themes and the strategy for mitigating any weaknesses
- The tender requirements
- Agree question ownership
- Agree the peer reviewers
- The bid plan

Following the meeting the slide pack will be circulated to the bid / project team.

Regular reminders will be sent to the team throughout the bidding process regarding the dates of the key milestones and the importance of providing us with clarification questions as soon as the need for them is identified.

The peer reviewers will be contacted immediately following the kick-off meeting to confirm the date of the peer review and to explain what will be required of them both in advance and during the review.

Answer Guidance Template (AGT) development

Impart will produce an AGT for every scored question, providing the SMEs with a significant amount of information / guidance to support the development of their answers, including response structure, key customer phrases, evaluation criteria, win themes and writing tips. This guidance allows SMEs to produce high quality first drafts effectively, ensuring they are answering the question that has actually been posed, rather than starting with a blank sheet of paper and missing what's required.

Draft response production

We appreciate that every SME / stakeholder is different, whether that be personality, experience, capability, capacity or the ability to perform under pressure, and this can have a significant impact on the production of responses. Therefore, we can flex the application of the writing process on an individual basis to support each SME / stakeholder and to allow us to get the best from them. In consultation with you, we can assess each SME / stakeholder against the factors above, review their allocated questions / actions and determine the most appropriate way to develop their 1st and 2nd draft answers.

For instance, we could:

- Provide the SME / stakeholder with the AGT (explained above) for them to produce the 1st draft answer
- Provide the SME / stakeholder with the AGT, meet with them to discuss it and how best to answer it, then they produce the 1st draft answer
- Provide the SME / stakeholder with the AGT so they are familiar with what is required, interview them or obtain previous relevant content, and then Impart writes the 1st draft answer. Once complete, this is passed to the SME to review.

Review process

Each response produced by an SME undergoes a minimum of two reviews by Impart, with us providing feedback / suggestions and amending the drafts to maximise their quality / score. Responses written by Impart will be reviewed at least once following a review by the SME. Track changes and comments are used to ensure this is done as efficiently and effectively as possible. Key areas of focus include:

- Ensuring the question and relevant requirements are addressed
- Optimising the response structure and language (including ensuring the entire response speaks with a single voice)
- Highlighting the benefits you deliver
- Providing supporting statements with evidence and examples
- Reinforcing your win themes
- Addressing the evaluation criteria, for example where you exceed the requirements (if required to achieve maximum marks)

The combination of AGTs and our comprehensive review process ensures each response fully addresses the question, relevant parts of the specification / requirements, and evaluation criteria. This approach makes the response easy for the

evaluator to review, encouraging them to award a high score, and therefore giving you the best possible chance of success.

Peer (Critical Friend / Red Team) review

This is an internal peer review / dummy evaluation of the response that is typically undertaken 5-7 days before the submission deadline (timetable permitting). To make the session as effective and efficient as possible, the latest draft of the response document is shared with the peer reviewers at least a day beforehand. During the meeting, all of the peer reviewers' feedback / comments / suggested amendments are discussed and appropriate amendments are made / captured as actions. This process adds the final polish to the response, ensuring it is as compelling and high scoring as possible.

Quality assurance

Maintaining the highest level of quality assurance (QA) is a fundamental aspect of our bid support service. We undertake QA at every stage of the process, supporting our customers in producing high-quality and compelling responses. Activities include:

- Run comprehensive kick-off meetings which, among other things, identify responsibilities and accountabilities, and detailed timelines / deadlines.
- Evaluate and provide feedback on the draft responses at multiple review points to ensure requirements / criteria are addressed.
- Undertake a final peer review (often including customers' senior executives) of the response to provide assurance of its quality and that requirements have been met.
- Use customer / stakeholder feedback to implement continuous improvements. We ensure we have met / exceeded requirements through performance measures, including our win rate, the quality scores achieved, and feedback received.
- Undertake a lessons learnt review on project completion to further improve the quality of our tailored approach

Our QA process leads to improved performance, evidenced through the increased win rate and success our customers achieve with our support.

3. Presentation support

Impart recognises the importance of presentations during tender processes and the impact they can have on contract award decisions. We are also aware that presentations can be necessary during the development of business cases to engage stakeholders, and also when pitching business development ideas or delivering qualification

workshops. As such, we have a robust and well-proven process to support public sector organisations in preparing for them. The key stages are:

- Planning workshop – Impart will facilitate a workshop with the presenting team to share best practice, practical preparation for presentations (e.g. venue, parking restrictions, rendezvous timings, multiple laptops) and:
 - Analyse each topic/question, your proposal and the specification to determine the key points to be included within the presentation, e.g. benefits, evidence, win themes, key phrases
 - Design/build the presentation structure
 - Determine the most appropriate individuals to attend the presentation
 - Agree which presentation attendees will be responsible for presenting which elements and answering questions on which topics
 - Agreeing who will take the “lead” role for the presentation. This is a key role in managing presentation timings and controlling Q&A sessions, giving the subject matter experts time to gather their thoughts before responding
 - Agree who will be responsible for creating the presentation content
 - Agree what additional materials are required (e.g. slide handouts) and coordinate their production
 - Agree who will attend/support the final presentation run-through
 - Finalise the timetable for the presentation preparation including timescales for producing and reviewing draft content, and presentation/Q&A run-throughs
- Presentation preparation/review – selected individual(s) produce the presentation content (e.g. PowerPoint slides), which we incorporate into a single presentation, standardise (ensuring it is consistent and in accordance with the required communication standards) and review. This draft is then circulated to the presentation team for review and comment.
- Initial run-through – each presenter delivers their allocated content to Impart and the other presenters and then as a team undergo a Q&A session. This is repeated as many times as is necessary, with Impart and the other presenters providing constructive feedback and guidance.
- Final run-through – each presenter will present their allocated content to Impart, the other presenters and the other selected attendees and then undergo a Q&A session. Again, this is repeated as many times as is necessary, with Impart, the other presenters and the other attendees providing constructive feedback and guidance. During the final run-through we restate the practical things that can be done in preparation for the presentation.

Impart can also attend presentations and customer/stakeholder meetings as required, not only to present but to provide support and guidance through what can be long, interactive and difficult sessions with numerous attendees on both sides.

4. Training

Our in-house training courses have been designed to perfectly align with our services. They are highly interactive and focus on bridging identified skills and knowledge gaps to ensure that delegates, irrespective of sector, have the tools necessary to excel, whether that is in building strategic relationships, writing compelling content or leading critical procurements. We have delivered training to over 2,500 delegates and consistently receive exceptional scored feedback, with delegates stating the courses are “Very useful and informative”, “Excellent and well worth attending” and “Of a high standard and well presented”.

Our most popular courses are:

Best Practice Bid Writing

A one-day training workshop that looks at response writing from both the evaluators’ and bidder’s perspective.

The course introduces delegates to a methodology (process, tools and techniques) that can transform their internal process to produce significantly improved tender responses, grant applications and business cases, which are both compelling and evaluator-focused. Through the interactive nature of the day attendees have the chance to apply elements of the methodology to their own opportunities, bringing the theory to life and maximising the value they realise from it.

Areas covered during the day include:

- The evaluation team and evaluation process:
 - How organisations build an evaluation team
 - The process they go through when evaluating tenders, grant applications and business cases
 - Analysing the evaluation criteria and modelling quality/price weightings
- Evaluation activity
- Selling in tenders, grant applications and business cases:
 - Features and benefits
- Response writing methodology – overview of our best practice approach to bid writing and a look at each key element of the process:
 - Kick-off meeting
 - Question analysis – designing the optimal structure for your answer
 - Answer Guidance – a tool that assists question owners to write high quality answers
 - Writing content – hints and tips
 - Contractual considerations
 - Response checklist – ensuring responses follow best practice
 - Red Team review – an independent peer review in advance of the final submission

Business Development

A one-day training course that explores the key business development and sales skills required to build strategic and enduring relationships with customers, stakeholders and/or colleagues.

The course introduces attendees to a range of sales skills and techniques, and through the interactive nature of the day, provides an opportunity for them to immediately apply their learning to existing and potential future business development opportunities. This allows the attendees to objectively assess how they are currently placed for particular opportunities and what can be done to improve the likelihood of success.

Topics covered during the course include:

- Different approaches to business development
- Customer interaction
- How to sell your services
- When to pursue an opportunity/grant application/tender
- Customer/stakeholder analysis
- Competitive analysis
- Procurement routes
- Sales strategies

Course times

Standard course times are 9.00am–5.00pm (includes an hour break for lunch). Dates and times are flexible and can be confirmed during booking.

Location

In most instances, the course will take place at your office or at an alternative location arranged by you. The room will need to be appropriately sized for the number of attendees and include a table for them to work around, a projector and screen or large television, and a flipchart with paper. The courses can also be delivered virtually using Microsoft Teams. Whilst we believe that face-to-face sessions bring additional benefits (e.g. team bonding), it may be more practical to deliver them virtually. The courses can also be segmented into half day, or even “power hour” sessions.

After delivering the initial programme, we can provide refresher courses on a quarterly, biannual or annual basis. Some organisations ask us to deliver our Best Practice Bid

Writing training course when a new tender or grant application is released so the in-house team can learn and embed the process together, ensuring team cohesion and a unified vision. Our training courses can be tailored to an organisation's specific requirements, no matter the sector or size.

5. Onboarding / offboarding support

As an "aaS" business, there is little requirement for traditional onboarding/offboarding support. However, we will work with the customer to produce a "Scope of Works" (SoW), from which the nature of our engagement will be defined, including any agreed SLAs and performance metrics.

Due to our flexible working processes, we often work with customers' SMEs in whichever way best supports their requirements/needs, including on-site face-to-face. A kick-off meeting will ensure stakeholders understand our role and responsibilities as defined in the SoW, and how we will work together over the duration of the contract. Onboarding can take place in less than a day.

Regarding offboarding support, we will ensure the customer is updated regularly about the progress of the service we are providing until completion. If we are performing a service that requires Impart to submit a document, the customer will receive a copy of the final submission, plus any earlier iterations (if requested).

If required, we will deliver the outcome of the submission to the customer, and undertake a lessons learnt workshop with them.

Implementation plan

As an "aaS" business, there is little requirement for a traditional implementation plan, however as part of our quality assurance process we will create a high-level plan for the project, including timescales (and deadlines), and roles and responsibilities, which will be presented at the kick-off meeting and shared with all stakeholders. This will ensure the seamless implementation of our service with the customer's business operations, through clear responsibilities, accountabilities and governance.

6. Business continuity

As an "aaS" business, we have secure Cloud-based systems that ensure all data is highly available, mirrored and backed up. This eliminates the risk of data loss and, should a disaster scenario occur (e.g. loss of offices), all employees can work remotely with no impact on the customer as successfully evidenced during the COVID pandemic. This information is presented in our Business Continuity Policy and our Disaster Recovery Policy, which can be provided on request.

7. Data protection

We are a controller of the personal data disclosed by or on behalf of the customer, and a processor of it for the purposes of performing the service. Impart will comply with all of the obligations imposed on a controller/processor under the applicable data protection legislation (including the Data Protection Act 2018 and GDPR), in respect of personal data. We will process personal data in accordance with our Privacy and Data Management Policy, which is available (on request).

All data gathered during the course of our involvement will be provided to the customer upon request at the exit stage. This will comply with our data protection commitments as specified above.

8. Support levels

We are readily available to support customers, answer questions and offer guidance for all of our services. We are available for calls and meetings as and when required and can work out of office hours to ensure deadlines are met without compromising quality.

We will provide every customer with a Lead who will be their primary point of contact and ensure our quality assurance process is followed.

After-sales support

We will happily provide ad-hoc advice and guidance where required outside of the scope of our services.

Hours of operation

The standard service hours will be Monday-Friday 0900-1700hrs, excluding public holidays.

Impart will, however, provide services out of hours (evening and weekends) to make the most of the time available, adapting our engagement with the customer to ensure the highest quality deliverables, including having a regular on-site presence throughout the process if required.

9. Service constraints

The services we provide have no constraints, restrictions or limitations.

We tailor our approach to each customer, providing capacity and capabilities to complement their in-house resources. Our flexible resource model and access to a pool of skilled resources means we are always able to support client demand, all underpinned by our cost-effective "aaS" model.

10. Technical requirements

As an “aaS” supplier, we require customers to be able to produce content electronically and have access to email and a phone.

11. Outage and maintenance management

As an “aaS” supplier, we ensure all previous versions of documents are stored on our Cloud server, creating an effective audit trail. Should data need to be recovered for audit purposes, all previous versions are available.

This also allows for our employees to operate during outages or maintenance periods, with all documents available both locally and on the cloud.

12. Ordering process

Impart will issue an Engagement Letter to the customer which will operate as an invitation for the customer to issue an order (which may be a formal purchase order or an informal email). Any Engagement Letter is only valid for a period of 30 days from its date of issue. More detail can be found in our Terms and Conditions.

Invoicing process

Impart's standard terms are:

- Invoices are raised monthly in arrears for work undertaken during that period
- Full payment is due from the customer within 30 days (unless stated otherwise in the Engagement Letter) of the date of the invoice

Charges are quoted exclusive of VAT, which shall be added to each invoice at the applicable rate and paid by the customer. More detail can be found in our Terms and Conditions.