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## Three Reasons 'Templating' Is A Bad Practice When Developing Your Approach to A High-Value Bid



There's an endless list of reasons why relying on templates is highly inadvisable in high-value tenders and proposals - and I've covered certain of these in my columns to date.

However, the advisability of adopting an "anti-template" policy is just as pertinent to bid strategy formulation, as it is to the production of the end submission.

Here are just three reasons why what I call "templated thinking" should be hotly avoided when formulating strategy:

### 1) Genericism vs Uniqueness: A Process that Doesn't Match the Required Mindset

Once the nature of a procurement or project is understood, a bid team should endeavour to identify and place focus on the characteristics of that procurement or project that are unique to that specific project.

Thus, past the first few hours of a strategy development session, trying to run it with the use of pre-formulated, generic outlines is potentially counterproductive.

### 2) Strategy Development Should be Led By A Strategic Thinker

The ability to run a group through a questions-based,

columnised template - or a series of them - is not the approach a genuine strategist would take, Kelly says.

A true strategist will allow conversations to evolve naturally, channelling the thinking and discussion along in a lateral and flowing - albeit well-controlled - fashion, fully developing all threads of input.

This is something a template simply can't achieve.

### 3) A Template-Directed Discussion Will Hit An Early Wall

By its very nature, a template just can't go deep enough in the development of strategy.

At best, the conclusions resulting from a templated approach will stop the discussion at a generically pre-determined point - and quite possibly (well) short of the best possible strategic decision.

### Strategy formulation should be a fluid process.

I've seen, for example, workshop agendas that have tight little windows of time for the discussion of competitive

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intelligence. And another very precise window of time to run the participants through some columnised series of questions relating to inside knowledge on decision-makers.

What's never considered or catered for, is the widely varying extent to which these various aspects of investigation need to vary from bid to bid, in terms of their strategic contribution to the approach or proposition that it ultimately tabled to the client or customer.

A tight and well-formulated strategy can result only from a synthesis of moving parts. And I've never seen a template with the required stretch, movement and overall flexibility to allow bid strategy workshop participants to go adequately deep and wide in their thinking. In short, it's an art . . . a highly developed skill that can't - and shouldn't - be reduced to a questionnaire-based activity. ■