A PRACTICAL GUIDE FOR SAP & ERP BID TEAMS

Planning an RFP Response That Wins

What to decide, build and review — from the day the tender lands to the day you submit.

1 Qualify

2 Deconstruct

3 Win strategy

4 Build & review

5 Submit & learn



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INTRODUCTION

Most RFPs are decided before anyone writes

Large SAP and ERP tenders are rarely won by the team that writes the most. They are won by the team that decided the most, earliest: whether to bid, how the client will score, what story the response will tell, and how the team will get there without a 2 a.m. scramble.

This guide walks through the five stages of planning an RFP response and the decisions each one needs. It is written for system integrators and consultancies bidding for SAP and ERP transformation work, but the method applies to most complex B2B tenders.

Stage	What it produces	Typical timing*
1. Qualify	A documented bid/no-bid decision and a named bid owner	Days 1–2
2. Deconstruct the RFP	Compliance matrix, scoring model, clarification questions	Days 1–3
3. Win strategy	Win strategy statement, win themes, solution and commercial outline	Days 2–5
4. Build & review	Storyboards, drafts, colour-team reviews, executive summary, pricing narrative	Days 5 to submission minus 2
5. Submit & learn	Compliant submission, orals preparation, debrief and lessons learned	Final 2 days and after

* Based on a four-to-six-week response window. Compress proportionally for shorter deadlines, but keep the order.

> **The core idea:** decisions first, drafts second. Every hour spent agreeing the win strategy saves several hours of rewriting sections that pull in different directions.

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STEP 1

Qualify: decide whether to bid at all

The cheapest win strategy is not entering bids you cannot win. A disciplined bid/no-bid decision protects your best people for pursuits where you have a real chance.

Score each question 0–3 and write one line of evidence beside every score. A score without evidence counts as zero.

Question	What a strong answer looks like	Score 0–3
Client relationship	Named contacts at decision-making level; recent, substantive conversations before the RFP was issued	
Requirement shaping	You influenced the scope, approach or evaluation criteria — or know who did	
Fit and capability	Relevant references in the same industry and SAP scope; delivery leads you can name today	
Competitive position	You know the likely competitors and the incumbent, and why the client might move	
Commercial viability	You can win at a price and risk profile your business is happy to deliver	
Capacity to respond	Bid lead, solution architect and pricing lead available for the full response window	
Strategic value	The account, reference or capability matters beyond this one deal	

Reading the result

- **17–21:** bid, and resource it properly.
- **11–16:** bid only if you can close the specific gaps the low scores reveal, and name who will close them.
- **10 or below:** strongly consider declining, or responding in a way that builds the relationship for next time.

> **Test:** write down the three reasons this client would choose you over the incumbent. If you cannot do it in a minute, that is either your first piece of work or your no-bid decision.

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STEP 2

Deconstruct the RFP before you answer it

Read the evaluation criteria before the requirements. The scoring model tells you how evaluators have been told to think — and where a vague answer will cost marks.

Build the compliance matrix

Before anyone writes, capture every requirement, question and mandatory attachment in one table. It is unglamorous work, and it is what makes a response easy to score.

Column	Why it matters
Requirement / question ID	Mirrors the client's numbering so evaluators can find every answer
Mandatory or scored	Mandatory items are pass/fail — one miss can disqualify the whole response
Evaluation criterion and weighting	Shows where marks are concentrated and where to invest effort
Owner and reviewer	One named person accountable for each answer
Response section and page/word limit	Keeps structure aligned to the client's template and limits
Status	Not started / drafted / reviewed / final — the basis of daily stand-ups

Read for what is not written

- **Weightings:** 40% on delivery approach and 20% on price is a different bid from one that weights price at 50%.
- **Language:** repeated phrases ('business continuity', 'clean core', 'value realisation') are the client's priorities in their own words — use them.
- **Gaps and ambiguities:** list them as clarification questions early. Clarification deadlines usually fall well before submission.
- **Commercial and legal terms:** liability caps, payment milestones and acceptance criteria can change your pricing and risk position — involve commercial and legal colleagues in week one, not week four.

Structure rule: answer in the client's order, with the client's headings and numbering. Start every answer with the direct response, then the evidence.

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STEP 3

Agree the win strategy before writing

The first 48 hours should produce decisions, not drafts. A strong kick-off agrees what the response is meant to say — so that section 7 tells the same story as section 2.

The win strategy statement

One paragraph that answers: what outcome does this client need, why are we the safest and most valuable choice to deliver it, and why should they act now? If it cannot be read aloud to a senior stakeholder in under a minute, keep editing.

Win themes

Three to five themes that every section reinforces. Each theme links a client need to a specific strength and the proof behind it.

Client need	Our strength	Proof point	Where it appears
e.g. Minimise disruption to month-end close during migration	Phased cutover approach with rehearsed dress runs	Reference client of similar size; cutover metrics	Exec summary, delivery approach, risk section

Also agree at kick-off

- **Solution outline:** scope, approach and key assumptions, at a level every author can explain in plain words.
- **Commercial approach:** pricing model, target price range and the value story that justifies it.
- **Competitor view:** what each likely competitor will claim, and how your themes neutralise it — without naming them in the response.
- **Team and roles:** who owns what, and who makes the final calls.

Core roles

Role	Accountable for
Bid owner / executive sponsor	Bid/no-bid, final price approval, client executive relationship
Bid director / proposal lead	Win strategy, plan, storyline, quality and on-time submission
Solution architect	Solution design, scope, assumptions and technical answers
Delivery lead	Delivery approach, plan, staffing and risk — the person the client will meet
Commercial / pricing lead	Cost model, price, terms and the pricing narrative
Bid coordinator	Compliance matrix, version control, formatting and production

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STEP 4

Build and review against the plan

Plan backwards from the submission date, and build in reviews early enough to act on what they find. A plan with no time to fix review findings is a hope, not a plan.

A backwards plan for a four-week response

When	Milestone
Week 1	Kick-off; bid/no-bid confirmed; compliance matrix; clarification questions submitted; win strategy and themes agreed
Week 1–2	Storyboards for each major section (key messages, proof points, graphics) — reviewed before full drafting
Week 2–3	First full drafts; pricing model built; executive summary drafted from the win strategy
End of week 3	Red-team review: independent reviewers score the draft against the client's criteria
Week 4	Fix red-team findings; final pricing approval; executive summary finalised; production and formatting
Submission − 2 days	Gold review and sign-off; compliance check against every mandatory item
Submission − 1 day	Submit early. Portals fail, uploads time out and files get rejected on the last afternoon

Colour-team reviews

Review	Question it answers
Storyboard review	Is every section saying the right thing, aligned to our win themes, before we write it in full?
Red team	If we were the evaluator, how would we score this draft — and where would we hesitate?
Gold team	Are we happy to sign this, at this price, with these terms and risks?

The executive summary and the price

- Write the executive summary from the win strategy, early, and refine it as the bid matures. Many senior evaluators read little else.
- Narrate the price: by the time the reader reaches the number, they should understand what it buys, why it costs what it costs, and what the alternative costs them.
- Cover the price table and read the page before it aloud. Does it make the number feel inevitable? If not, rewrite the page, not the number.

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STEP 5

Submit, present and learn

Submission is not the finish line. Orals, clarifications and the debrief are where many close contests are decided — and where next year's win rate is built.

Orals and presentations

- Field the people who will actually deliver. Evaluators are choosing a team, not a slide deck.
- Rehearse against the scoring criteria and against the hardest questions, with someone playing a sceptical evaluator.
- Open with the client's outcome and your win themes; keep architecture detail for questions.

Debrief — win or lose

- Always ask for a debrief. Public-sector buyers commonly provide scoring feedback; private-sector clients often will if asked.
- Compare their scores with your red-team scores. The gap shows where your self-assessment is off.
- Record three lessons and one change to your bid process, and make sure the next bid team actually sees them.

Why debriefs matter: teams that review every outcome get better at qualifying, at reading scoring models and at telling their story. Teams that only celebrate wins tend to repeat the same losses.

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CHECKLIST

RFP response planning checklist

Use this on day one and at each review. Every 'no' is a risk to the bid — and usually cheaper to fix now than later.

Qualify	
Bid/no-bid scored with evidence and signed off by the bid owner	☐
Three reasons the client would choose us, written down	☐
Core team named and available for the full window	☐

Deconstruct	
Evaluation criteria and weightings read first	☐
Compliance matrix complete, with owners for every item	☐
Clarification questions submitted before the deadline	☐
Commercial and legal terms reviewed in week one	☐

Win strategy	
One-paragraph win strategy agreed	☐
Three to five win themes, each with proof points	☐
Solution and commercial approach agreed in plain words	☐
Competitor positions understood and addressed	☐

Build & review	
Backwards plan with dated reviews and time to act on them	☐
Storyboards reviewed before full drafting	☐
Red-team review scored against the client's criteria	☐
Executive summary written from the win strategy	☐
Price narrated, not just presented	☐

Submit & learn	
Every mandatory item checked off against the matrix	☐
Submitted at least a day early	☐
Orals team = delivery team, rehearsed against the criteria	☐
Debrief requested and lessons recorded	☐

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ABOUT DEALCRAFT ADVISORY

Win the bids that matter

Dealcraft Advisory is an independent bid-direction and coaching practice for the SAP and ERP sector in Ireland. It works with the system integrators and consultancies that compete for large S/4HANA, RISE with SAP and ERP transformation contracts, and with the organisations that buy them.

Service	What it covers
Bid Review Clinic	A focused half-day review of a live or recent bid — win themes, structure and competitive positioning
Bid Director / Proposal Lead	An experienced hand on a specific live pursuit, owning win strategy, storyline and submission quality
Buy-side Tender Support	For organisations running their own SAP or ERP procurement
Coaching Programme	Six sessions building a sales and bid team's capability for every future pursuit
Team Capability Workshop	A full day for a whole bid or pre-sales team, worked live on real material

Got a live pursuit? A short conversation is enough to work out whether the gap is strategy, staffing or story.
hello@dealcraftadvisory.ie · dealcraftadvisory.ie · Dublin, Ireland

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