DEALCRAFT ADVISORY

The Bid Director

Win the Deals That Matter

DAKSH KUMAR

CHAPTER 2

Day One: The Cheapest No You'll Ever Say

381 Envelopes, Five Answers

Here's a number worth sitting with before you commit a single person to a bid.

Prairie County's purchasing office sent this RFP to **381 vendors.** When the proposals were opened in a conference room seven weeks later, with a phone line open for anyone who wanted to listen in, **five** firms had submitted a priced proposal.

Three hundred and seventy-six companies looked at this opportunity and decided, explicitly or simply by letting the deadline drift past, not to play. Some couldn't. Some shouldn't have. A few probably meant to and ran out of time. The five who did bid spent somewhere between a few tens and a few hundreds of thousands of dollars of senior people's time each. Exactly one of them got its money back.

When I tell bid teams this, someone always says, "Well, the other three hundred and seventy-six weren't serious." Maybe. But I'd bet that in at least a dozen of those firms there was a Rob, standing in a doorway on a Wednesday morning saying, *this is ours, isn't it?* And in at least a dozen there was nobody to say, *let's find out.*

So on Thursday morning, day one, I put the Northbridge team in a room for ninety minutes with one question on the whiteboard:

Should we bid?

Rob said, "Obviously." Maya said, "Depends." Tom, who was billable on another client until September and hadn't yet been told he was our named project manager, said, "Who's 'we'?"

All three were right.

Two Questions, Then a Third

The best qualification framework I've ever used comes from Revenue Storm, a sales-performance firm whose methods we used for years on our largest pursuits. Strip away the software and the workshops, and it comes down to two questions you ask of every pursuit:

- **Should we sell?** Is this good business for us? Is there real value, a real budget, a fit with what we do well, a margin we'd be proud of?
- **Can we sell?** Can we actually win it? Do we have relationships, access to the people who decide, a solution that fits and an edge over the competition?

Revenue Storm builds tools around those two axes, alongside what it calls a relationship barometer: a scoring of each contact's relationship strength and how much political influence they really hold. You don't need the software to use the idea. You need the discipline to answer honestly.

In two years as a Lead Sales Coach, reviewing deals that added up to about $400 million of signings, I ran a lot of qualification rounds. The pattern I saw again and again was that teams answer the first question with enthusiasm and the second with hope. *It's a great account* (should). *We'll build relationships during the bid* (can).

You almost never do. By the time an RFP is published, the relationships that matter have already been formed. With somebody.

So I add a third question, my own, and it's the one I'd have tattooed on every bid director's forearm if HR allowed it:

Why are we invited?

On a private deal, the answer should be a person: a sponsor who asked for you, a problem you've already discussed with them, a point of view they've heard and liked. If you can't name that person, assume the answer is the one nobody says out loud.

On a public tender, the honest answer is often *because the law says the county must advertise*. That isn't a reason to bid. It isn't a reason not to, either. It simply means the burden of proof is on you, and that everything you'd normally achieve over lunch, you'll now have to achieve on paper.

WAR STORY

War Story: La Défense

The best "why are we invited?" story I have doesn't come from a public tender. It comes from a very private one.

La Défense, the business district just west of Paris, on a weekday morning, is glass, coffee and lanyards. It's a forest of towers with names like insurance companies and insurance companies with names like towers. I was there because a packaging manufacturer, a big one with plants across Europe and an SAP estate that had been looked after by the same integrator for years, had invited us to take part in an RFP.

You have to understand how rare that feels. Most of the year, you're the one chasing. You're sending the third follow-up email, the one that begins "Just circling back," which is sales language for "please acknowledge that I exist." And here was a procurement team chasing *us*. The procurement lead was charming. They were going to market, she said. They wanted fresh thinking. They would be delighted if we'd take part, and would we come to their offices to walk through the process?

My team was thrilled. Someone had already started a folder. Someone else had started a slide titled *Why us*. I should have been suspicious of how good it felt. In this business, an invitation that costs the buyer nothing and costs you everything is not always a compliment.

We were signed in, given visitor badges on little clips, and walked to a meeting room. On the way I noticed something I couldn't stop noticing.

The incumbent was everywhere.

Their people sat at the client's desks, on the client's network, in the client's meeting rooms, doing the client's work. They weren't visiting. They lived there. You could tell from the coffee mugs. Visitors don't have mugs. I counted the incumbent's laptop stickers before I reached our room, and I stopped counting at a number that made me feel slightly unwell.

That alone is normal. Incumbents are incumbents; they're supposed to be there. What wasn't normal came next.

We asked to meet the business. The plant directors, the supply-chain lead, finance, anyone who would actually live with the new system. Procurement smiled and said the process didn't allow it. All questions in writing. All answers through procurement.

So here was the picture. The incumbent had the run of the building. We had a visitor badge, a clip, and an email address.

I've learned that when something feels off in a bid, the cheapest thing you can do is ask about it out loud. Not cleverly. Not with a strategy. Just out loud. So in our next session I asked the procurement lead, as politely as I could manage, a question my team teased me about for months afterwards:

"*Help me understand why you want us in this process. Is it to find genuine innovation, or to bring down the incumbent's price?*"

There was a pause.

I've been in a lot of meetings in my life, and I've learned that some pauses are thinking and some pauses are answers. This was the second kind. It went on long enough for me to notice the air conditioning.

She said the right things, of course: openness, competition, fresh perspectives. But over the following days we kept pulling the thread. The business stayed out of reach. The timetable had no room for discovery. The requirements read like a description of what was already running, rather than a description of what anybody wanted next.

We weren't there to win. We were there to be the number on the other side of the table: the benchmark that would let procurement walk back into the incumbent's account review and say, *the market says you're too expensive*. In the trade, there's a name for that role. **Column fodder.** You fill a column on somebody's comparison spreadsheet, and that's all you were ever invited to do.

We withdrew.

It wasn't a popular decision on my own side. A live RFP from a household-name manufacturer looks wonderful in a pipeline review. Someone always says, *you can't win if you don't play*. That's true. It's also true that you can't win if the game was decided before you arrived.

Add up what playing would have cost. A serious SAP response takes a solution architect, a delivery lead, a pricing specialist, a bid manager and an executive sponsor for six to ten weeks, followed by orals, followed by a best-and-final-offer round. That's easily hundreds of thousands of euros of senior time, all of it taken away from bids we *could* win. And the best case was a hard-won price that the client would use to negotiate with somebody else.

There's a hidden cost too. Every time you play the stalking horse, you teach a client that you'll come running when called. And you hand them your pricing, your approach and your best ideas, all of which they can pass on, free, to the integrator they were always going to keep. You're not just losing a bid. You're funding your competitor's account plan.

So we wrote a short, courteous letter. We thanked them for the invitation, said that on this occasion we would not be submitting, and left the door open for a conversation with the business whenever they were ready for one. No drama, no burnt bridges.

The team was deflated for about a week. Then two of the people who would have spent the next two months on that bid went onto one where we had access, a sponsor and a point of view.

I've never regretted that pause. The cheapest *no* I've ever said cost me one meeting, one visitor badge and one awkward silence. The most expensive *yes* I've ever said cost a great deal more, and you'll hear about it in a moment.

WAR STORY

War Story: The Wall in the Qualification Room

Here's the counterweight, because I don't want you to leave this chapter thinking that the answer is always *no*.

Remember Kestrel, the €200 million outsourcing re-compete from Chapter 1? Before we bid, we did what disciplined teams do. We took it through a full Revenue Storm qualification session.

Picture a long table, a wall of flipchart paper and a facilitator patiently asking the questions nobody likes answering out loud. *Who at the client wants us to win? Who would lose face if we did? Who decides, really? Where's the incumbent strongest? What do we know, and what do we just believe?*

The wall filled up fast with the things we knew. It filled up slowly with the things we didn't. By the end of the day the shape was obvious to anyone willing to look at it. We had friends high up in the client, and very few further down. The incumbents had been there for years. Some of their staff were the client's own former employees. And we

had some history at the account that nobody in the room wanted to talk about, which is always the history that matters most.

Here's the thing about a qualification method. It's brilliant at telling you where you're weak. It has no power at all to make you act on what it tells you. That part is leadership, and leadership was looking at a deal measured in hundreds of millions of euros, at a client we'd worked with for years, in a market we wanted to grow.

So we bid. All of it.

Then we tried something less usual. We brought in a small firm of former colleagues, people who had spent their careers on our side of these tables and now sold that judgement back to us, to run a shaping session. They arrived with frameworks, an outsider's read of the client and the confidence of people who no longer had to sit in our review meetings. Around the table sat every practice leader with a stake in Kestrel: applications, infrastructure, cloud, deployment, pricing, the account team. You could feel the room sorting itself before anyone spoke: who would defend, who would wait, who would quietly take notes for their own boss.

Very little of what the consultants recommended survived into the bid. I knew that before the session ended.

Would I run it again? In a heartbeat. Because for one day every ego that would shape Kestrel was in the same room, hearing the same hard questions, at the same time. Email never gave me that once in the six months that followed.

Was bidding Kestrel the wrong decision? I've changed my mind about that more than once. A large firm sometimes bids a deal it's likely to lose because not bidding sends a message to the client, the market and its own people. That can be right. But it should be a decision, written down, with a capped cost and a stated purpose (*we are bidding to stay relevant at this account, and we'll spend no more than* X), not a drift.

What I'd do differently is simple. Every red flag on that wall deserved a name next to it and a decision: *fix it*, *price it*, or *accept it, out loud*. Most of ours got a shrug and a hope.

Qualification surfaces risk. Only leaders act on it. A method can tell you you're the outsider. It can't make the organisation invest to change that, or walk away. Every red flag needs a named response.

Scoring Northbridge

Back to Thursday morning at Northbridge. Here's the sheet as we filled it in. Eight questions, a score of 0, 1 or 2 on each, and a line of evidence for every score. A 2 with no evidence is a 0. That rule alone has saved more bids than any piece of software I've seen.

#	Question	Score	Evidence (Northbridge, day one)
1	Why are we invited?	1	Public tender, open to all. No sponsor asked for us, but the scoring rewards public-sector S/4HANA experience, which we have.
2	Do we know the people who decide?	0	We've never worked for this county. We know nobody in Finance, IT or Purchasing.
3	Did we help shape the requirement?	0	First saw it in the tender pack.
4	Where is the incumbent?	1	No implementation incumbent: the county has run SAP itself since 2002. But one SAP partner already holds the county's Ariba contract.
5	Can we name the delivery team?	2	Maya (Funds Management, two BCS conversions); Tom (public-sector PM, free from September, if we fight for him).

#	Question	Score	Evidence (Northbridge, day one)
6	Real budget, real reason to act now?	2	The county's audited accounts list the financial system implementation as a major initiative. ECC support pressure. Go-live date fixed.
7	Can we win at a price we'd be happy with?	1	Price is 10 points; but a fixed price on a 12-month Brownfield conversion with unknowns is risky.
8	Does the evaluation reward our strengths?	2	65 points on people, experience and plan. Our references are public sector.
	Total	**9 of 16**	

Nine is amber. The rule I use: **12 or more** with evidence on every line, bid to win. **8 to 11**, bid only if you can close the gaps in the first two weeks and name who closes each one. **Under 8**, walk away or go and shape the next one.

The two zeros, on access and shaping, are the dangerous ones. On a private-sector deal, a zero on line 2 would be a no-bid on its own. On a public tender with a cone of silence and a fixed evaluation committee, everyone starts near zero on access, so the question changes: *what can we do, legitimately, inside the rules, to be the bidder the committee feels it knows best by submission day?*

That answer shaped the next six weeks: a sharp set of clarification questions (Chapter 6), a reference the county could actually call (Chapter 14), and a demonstration built around one of their own people's working day (Chapter 14 again).

> **YOUR TURN.**
> Score your current bid on those eight lines, honestly, with evidence. Then cover the score column and show only the evidence column to someone who isn't on the bid. Ask them to score it. If their total is more than two points below yours, you're scoring hope.

The Line That Changed the Bid

Line 4 deserves a closer look, because most teams would have scored it 2 and moved on. "No incumbent" sounds like an open field.

But go back to the RFP's background section and read one sentence again, slowly:

> **FROM THE RFP**
> We will be purchasing Rise with SAP S/4HANA Cloud Private Edition, Premium (S/4HANA) directly from SAP and have contracted with [an SAP partner] for the purchase of SAP Ariba SNAP Buying (Ariba SNAP Buying). The goal is to minimize changes for our users when migrating from ECC to S/4HANA.

Someone already has a contract with this county. Someone already has people talking to its procurement team, a working knowledge of its processes, and a relationship that started before this RFP was written. If that firm bids for the implementation, it walks in with an advantage nobody else has, and very probably with the lowest price, because part of its cost base is already paid for.

I wrote one sentence on the whiteboard under the score:

The Ariba partner is our real competitor, and it will be cheaper than us.

Rob read it and said, "So we need to be cheaper."

"No," I said. "We need to be safer."

Hold on to that exchange. It matters in Chapter 12, and it matters most of all in Chapter 15.

The Decision

We decided to bid, with three conditions, written on the whiteboard and photographed so nobody could later remember them differently:

1. **A named owner for each zero**, with a plan by day ten. Maya owns access-through-the-document; I own the question strategy.
2. **A bid budget agreed today**, with a stop-loss review at the end of the question window. If the county's answers reveal something that makes this unwinnable, we stop, and nobody calls it a failure.
3. **Our two best public-sector people released from billable work for six weeks**, with the sponsor's signature on the release. Or we don't bid.

The third condition is the one that gets broken, in every firm, every time. It's the one that matters most. Chapter 5 is about why.

Tom, who had asked "who's 'we'?", now knew. He took it well. He said, "I'll need to tell my current client," and then, after a pause I recognised from La Défense, "You'll need to tell my current partner."

I did. That conversation is not in this book. Some things are best left in the meeting room.

The tool: the Bid/No-Bid Sheet

Eight questions. Score each 0, 1 or 2, with one line of evidence. Fill it in within 48 hours of the tender landing, before anyone writes a word.

#	Question	Test	0 looks like	2 looks like
1	Why are we invited?	Can	Unknown, or "to compare prices"	A named sponsor asked for us
2	Do we know the people who decide?	Can	Only procurement	Two or more decision-makers met in six months
3	Did we help shape the requirement?	Can	First saw it in the tender	Our ideas are visible in it
4	Where is the incumbent, and how happy is the client?	Can	Embedded and liked	Absent, or a known pain
5	Can we name the people who'd deliver it?	Should	Not yet	Named, available at award
6	Real budget and a reason to act now?	Should	No budget, no deadline	Funded, with a date that matters
7	Can we win at a price we'd deliver for?	Should	Only by buying the deal	Yes, at target margin
8	Does the scoring reward what we're best at?	Can	Price-led or tilted to incumbent	Weighted to our strengths

Read it: 12+ bid to win · 8–11 bid only with named gap-closers · under 8 walk away or shape the next one. A zero on line 1 or 2 is a no-bid on its own in private deals; in public tenders, read it as "plan to earn access legitimately."

THE RESPONSE SO FAR

2 of 15 pieces of Northbridge's Prairie County response built. Gold: what this chapter added.



THE BID DIRECTOR · COMING SOON

That was Day One. Fifteen chapters to go.

The full book follows one real $2.5 million SAP S/4HANA and Ariba RFP from the morning it lands to the afternoon it is awarded: reading how you'll be scored, the bid plan, the questions, the staffing plan, the risk in dollars, the price, the red team and award day.

Every chapter ends with a tool you can use on Monday morning. Some are already free at **dealcraftadvisory.ie**: the bid/no-bid sheet, the RFP compliance matrix, the scoping and data-run playbooks and the loss review whitepaper.

Want to know when it's out? Leave your email at **dealcraftadvisory.ie/book**.

Working on a live SAP or ERP pursuit? The first conversation is free: sales@dealcraftadvisory.ie

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