A BRITISH FIELD MANUAL

BID QUALITY BY DESIGN

A BRITISH FIELD MANUAL FOR BUILDING ISO 9001 INTO END-TO-END BID MANAGEMENT, BID WRITING AND APMP-ALIGNED PRACTICE

- ✓ PROCESS CONTROL
- ✓ EVIDENCE INTEGRITY
- ✓ RISK AWARENESS
- ✓ CONTINUOUS IMPROVEMENT

RACHELLE POTES

BID CHAMPIONS LTD

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Published by Bid Champions Ltd

United Kingdom - 2026

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First published in the United Kingdom in 2026 by Bid Champions Ltd.

Original UK edition.

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ISBN: 978-1-916752-13-9

Printed in the United Kingdom.

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This book is practical educational commentary about quality management, bid management, proposal development and organisational improvement. It is not a replacement for ISO 9001, ISO 9000, ISO 19011, APMP's Body of Knowledge, a licensed standard, professional training, legal advice or certification advice.

The current published requirements used as the principal reference for this edition are ISO 9001:2015 together with Amendment 1:2024 on climate action. At the time this manuscript was finalised, the sixth edition of ISO 9001 was under publication and expected to replace the 2015 edition in September 2026. Organisations should check the publication and transition position before relying on any clause reference, implementation decision or certification plan.

The book paraphrases management-system concepts and does not reproduce the copyrighted text of ISO standards. Readers intending to implement or certify a quality management system should obtain an authorised copy of the applicable standard and use appropriately competent advisers where needed.

APMP provides professional guidance and learning for bid, proposal, tender, capture and business-development practitioners. References to APMP-aligned practice in this book mean alignment with the general pursuit stages and practices described in APMP's current Winning Business Ecosystem and related resources. They do not mean that APMP has approved, certified or endorsed the system described here.

DISCLAIMER - CONTINUED

Every organisation is different. Its scope, interested parties, risks, processes, products, services, legal duties, customer requirements and certification arrangements must be determined from its own facts. Examples in this book are fictional or composite. Names, businesses, procurements and dialogue have been created for learning purposes.

No process described here guarantees a tender award, a particular score, ISO certification, profitable delivery or freedom from error. The author, contributors and publisher accept no responsibility for decisions taken without proper review of the applicable tender documents, contractual terms, laws, standards and professional advice.

The tender documents outrank this book. The licensed standard outranks this book. Evidence outranks confidence.

STANDARDS STATUS AT PUBLICATION

This edition was completed on 21 August 2026. It is written against ISO 9001:2015 and ISO 9001:2015/Amd 1:2024 because those were the published certifiable requirements at that date. ISO's sixth edition was in final production and expected in September 2026. A sensible organisation will therefore implement the durable management-system disciplines described here while keeping a controlled transition register for the new edition.

The durable disciplines are not difficult to recognise: understand context and interested parties; define scope; manage interrelated processes; lead visibly; plan for risk and opportunity; provide competent people and reliable resources; control operations; monitor results; audit the system; review it at management level; correct failures; and improve.

The clause numbering and some emphasis may change. The need to know what the bid process is meant to achieve will not.

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AUTHOR'S NOTE

Bid teams often meet ISO 9001 in the least useful way. A client asks for a certificate. Someone forwards a quality manual. The bid writer extracts three sentences, replaces the company name and moves on. The certificate becomes evidence of 'quality' while the actual bid is being managed through private inboxes, unowned assumptions and a folder containing FINAL, FINAL-2 and FINAL-USE-THIS.

That contradiction is the reason for this book.

ISO 9001 is not a library of polished procedures. APMP practice is not a collection of coloured review meetings. Both are useful when they change how work is decided, produced, checked, handed over and improved. They are almost useless when reduced to labels.

The pages that follow treat a bid as a service-producing system. It receives inputs. People make decisions. Information changes. External providers contribute. Risks move. Outputs are checked and released. The result may become a contract, a loss, a clarification, a learning record or sometimes a well-judged no-bid. Each result tells you something about the system, but only if you kept enough evidence to understand it.

Use the book with a live process beside you. Do not begin by writing a forty-page manual. Begin with the work as it happens on an ordinary Tuesday.

HOW TO USE THIS FIELD MANUAL

Read Chapters 1 to 5 first if the organisation has no defined bid process. They establish the system, the ISO logic and the APMP alignment.

Use Chapters 6 to 15 while designing or rebuilding the operation. Each chapter explains what to control, when the control belongs in the pursuit, what evidence should remain and what an auditor or senior reviewer may reasonably ask.

Use Chapters 16 to 18 when the process is running. Measurement, internal audit, corrective action and management review are where a documented process becomes a management system rather than a folder of intentions.

Do not implement every template at once. Risk decides depth. A five-person consultancy bidding twice a month does not need the same infrastructure as a national supplier running twenty concurrent pursuits. It still needs clarity over decisions, evidence, approval and handover.

Throughout the book, 'customer' may mean the contracting authority, private buyer, framework customer or internal business unit receiving the bid service. 'Bid' includes tenders, proposals, framework applications, call-off competitions and similar competitive submissions. 'QMS' means quality management system.

The APMP alignment used here follows four broad stages: pre-bid and capture; bid and proposal; post-bid and proposal; implementation and contract learning.

ISO 9001 runs across all four. It does not arrive at final review with a clipboard.

THE INTEGRATED PURSUIT MAP

FIGURE 1 | THE INTEGRATED PURSUIT MAP

PRE-BID AND CAPTURE Opportunity identification, customer and market understanding, qualification, leadership commitment, strategy, partners, resources and risks.
BID AND PROPOSAL Solicitation review, compliance, planning, solution development, pricing, evidence, writing, reviews, production, release and submission.
POST-BID AND PROPOSAL Clarifications, presentations, negotiation, award or loss, feedback, challenge decisions and controlled records.
IMPLEMENTATION Mobilisation, transfer of promises, contract administration, performance, customer feedback, change, learning and future opportunity development.

Across the entire map, the QMS asks the same awkward questions. What is the intended result? Who owns it? What must be true before work starts? What can go wrong? How will you know the output is acceptable? Which record proves that? What changes when the answer is no?

CHAPTER 1

The Bid System You Already Have

CASE FILE

> At 16:12, three hours after the submission deadline, Ellen found the attachment that had not been uploaded.

> It was not hidden. It sat in the same shared folder as the other files, named `Schedule_9_Insurance_FINAL.xlsx`. The portal receipt listed eight attachments. The checklist listed nine. Nobody had compared the two because the person who normally did it was on a train and the deputy had never been told that she was the deputy.
>
> The bid had a process. It simply was not the process described in the quality manual.
>
> That distinction matters more than certification language. Every organisation already has a way of deciding which opportunities to pursue, collecting information, building a solution, writing, pricing, reviewing and submitting. The way may be reliable. It may be improvised. Usually it is a mixture. A formal gate sits beside a managing director's late-night override. A compliance matrix exists, then a clarification changes the requirement and the matrix is not updated. A red review is booked, but the solution is still moving, so reviewers comment on sentences while the commercial model changes underneath them.

> ISO 9001 begins in reality, not in the procedure you hope an auditor will read.

Quality is the result, not the decoration - In bid work, 'quality' is often used to mean good writing. That is too narrow.

A beautifully written response can be non-compliant. A compliant response can be commercially reckless. A strong strategy can fail because the evidence was not approved. A correct price can be paired with a narrative that promises a different staffing model. A technically excellent bid can arrive after the portal closes. None of these failures is rescued by better adjectives.

The useful quality question is broader: does the bid process consistently produce outputs that meet requirements and support the organisation's intended results?

Sometimes the intended result is a submitted, compliant and competitive bid. Sometimes it is a reasoned no-bid. Sometimes it is a clarification question sent early enough to matter. Sometimes it is a controlled handover that prevents delivery discovering an unpriced promise on day one.

Winning is an important result, but it is not the only measure of process quality. A team can win through favourable circumstances while operating badly. It can also lose a strong, well-controlled competition because a rival is better, cheaper or more credible. A management system must be able to learn from both without inventing a comforting story.

The ordinary Tuesday test - Do not begin with clause numbers. Follow one live opportunity from the moment it becomes visible.

Who notices it? Where is it logged? What information is checked before anyone celebrates? Who can decline it? Who confirms the customer, scope, timetable and route? How are documents preserved? Who identifies mandatory requirements? When does finance become involved? At what point does delivery agree that the proposed service can actually be delivered?

Then continue.

Where are assumptions recorded? How are clarifications assessed? Who approves evidence? What happens if a subject-matter expert misses a deadline? Which version is authoritative? How does a reviewer know what 'good' means? Who releases the final submission? What is transferred after award?

If the answer is a person's name rather than a defined responsibility, remove that person from the room for ten minutes and ask again.

Ashbridge Facilities did this during a process workshop. Its bid director, Callum, answered almost every question with 'Mina'. Mina found opportunities, understood the portals, remembered the insurance limits, chased case studies, arranged signatures and knew which director would answer after 18:00. The company believed it had a mature process because bids were usually submitted.

Mina took two weeks' leave.

Three opportunities were logged twice, one clarification was missed and a director approved a price against an old specification. Nothing catastrophic happened, which made the lesson more useful. The organisation could see the weakness without having to explain a public failure.

The process was not 'Mina'. Mina was carrying an undocumented control system in her head.

Inputs, work and outputs - A bid process is easier to control when it is described as a process rather than as a sequence of meetings.

Inputs may include a pipeline record, customer information, a notice, tender documents, contract terms, previous performance, approved evidence, resource availability, partner commitments, pricing data and leadership decisions. The work transforms those inputs through qualification, capture, planning, design, writing, review and release. Outputs include decisions, plans, questions, priced solutions, submissions, receipts, promise registers, feedback and lessons.

The output of one process becomes the input to another. A qualification decision feeds capture. Capture assumptions feed the solution. The solution feeds pricing and writing. Review findings feed correction. The released submission feeds mobilisation. Contract performance feeds future evidence and future qualification.

When teams treat these as separate islands, contradictions multiply at the shorelines.

A pricing lead may receive a headcount assumption that the solution lead has already changed. The writer may use a case study whose figures were approved two years ago but no longer match operational records. The mobilisation manager may receive the tender only after award and discover that the bid promised recruitment before the organisation can obtain security clearance.

None of this is unusual. That is exactly why a system is needed.

Controls should be visible where the risk occurs - A common mistake is to place all quality control at the end. The final reviewer is expected to detect everything: missing requirements, weak strategy, incorrect numbers, inconsistent terminology, unapproved claims, inaccessible diagrams and files that exceed the portal limit.

That is not quality assurance. It is an ambush.

Controls belong close to the decision that creates the risk. Qualification controls strategic and commercial exposure before the organisation commits serious effort. Requirements review controls misunderstanding before solution design. Evidence approval controls unsupported claims before drafting. Pricing reconciliation controls narrative-price conflict before executive sign-off. Upload rehearsal controls portal risk before the final hour.

The final check still matters. It should confirm that earlier controls worked, not recreate the entire bid in miniature.

At a small engineering supplier, the managing director resisted this approach. 'We cannot have a form for everything,' he said.

He was right.

The answer was not more forms. It was five controls placed properly: a one-page gate record, a live requirements matrix, an assumptions and decisions log, a promise register and a release checklist. The company removed three weekly meetings at the same time. Control increased. Administration fell.

ISO 9001 does not require paperwork for its own comfort. It requires enough documented information to support effective operation and provide confidence that processes are carried out as planned. The amount and form depend on context, complexity, competence and risk.

That leaves room for judgement. It also removes the excuse that 'ISO made us do it' when nobody can explain why a document exists.

The bid process has customers - The contracting authority is an obvious customer of the submission. It is not the only one.

Senior leadership receives investment decisions and risk information. Sales or business development receives a disciplined route from relationship to pursuit. Finance receives assumptions, approvals and exposure. Delivery receives a service it has agreed to provide. Partners receive clear work packages and obligations. The quality team receives records that can be audited without archaeology.

A bid process that satisfies the evaluator while misleading delivery is not effective.

This is where customer focus becomes practical. Understand the external buyer's stated and implied needs, but also identify what the internal recipients require from the process. The mobilisation team may need a controlled summary of commitments within twenty-four hours of award. Finance may need a frozen pricing baseline and approval trail. A partner may need notice of a clarification affecting its scope before the response is rewritten.

These are not favours. They are process requirements.

The first process card - Start with one page. Name the process 'End-to-End Bid Management' or use terminology the organisation already understands. Do not mirror the standard's clause titles unless that genuinely describes the work.

Record:

- the purpose of the process;
- where it starts and ends;
- its main inputs and outputs;
- the sequence of stages;
- process ownership and decision authority;
- resources and competence needed;
- risks and opportunities;
- criteria and methods used to control it;
- measures of performance;
- key records and retained evidence;
- interactions with sales, finance, legal, delivery, quality and contract management.

The card is not the system. It is a map of the system.

Walk it with people who perform the work. Ask them where the map lies. They will usually point to the handover, the pricing approval or the final review. Listen to the disagreement. A process map that everyone politely accepts in one meeting is often too vague to be useful.

A maturity check without theatre - Score each statement from zero to three: zero means absent; one means dependent on individual memory; two means defined but inconsistent; three means routinely applied and evidenced.

- Opportunities are logged once, with an owner and source.
- Qualification decisions use explicit criteria and can be revisited.
- Customer and tender requirements are traceable.
- Assumptions, clarifications and decisions are controlled.
- Solution, price, evidence and narrative remain aligned.
- Roles and approval authorities are understood.
- Review findings are prioritised and closed.
- Final release is authorised against defined criteria.

- Submission evidence is retained.
- Tender commitments transfer into delivery.
- Performance and feedback alter future practice.
- People can explain the process without relying on one expert.

Do not add the scores too quickly. A total can hide a zero in the place that kills bids.

If release control scores three and requirements review scores zero, the organisation may be consistently releasing the wrong answer. If writing competence scores three and pricing reconciliation scores one, the prose may be making an unapproved commercial position unusually clear.

Look at the pattern.

What to do this week - Choose one recent bid and reconstruct its actual route. Use emails, file histories, meeting records, portal receipts and interviews. Do not improve the story while recording it.

Mark every point where:

- a decision was made;
- information changed;
- work moved between functions;
- an error could have ended or weakened the bid;
- approval was assumed rather than recorded;
- somebody used private knowledge to rescue the process;
- the final promise became an operational obligation.

Then identify three controls that would have prevented the most serious failure or reduced its impact. Give each control an owner, timing, input, output and record.

Three is enough for the first week.

The goal is not to make bidding bureaucratic. Bidding is already bureaucratic when people spend hours searching for the correct file, repeating the same meeting and repairing an avoidable mistake. A good QMS removes that waste and preserves the controls that matter.

The process exists now. Your choice is whether to see it.

CHAPTER 2

ISO 9001 Without the Wallpaper

CASE FILE

> The quality manual at Wrenford Digital began with an impressive sentence about excellence.
>
> It continued for forty-six pages.
>
> The bid team had not read it. The quality manager did not blame them. She had inherited the document during an acquisition and could not explain why several procedures referred to a warehouse the company had never owned.
>
> Yet Wrenford held an ISO 9001 certificate. It also lost a framework application because two turnover figures differed between schedules and nobody owned the supplier-information review.
>
> Certification had not failed them. They had used the certificate as a substitute for the system.

What ISO 9001 is trying to do - ISO 9001 sets requirements for a quality management system. It does not prescribe one universal operating model. It asks an organisation to understand its context, determine relevant requirements, manage processes, provide resources, control operations, evaluate performance and improve.

The standard is deliberately generic. A manufacturer, software company, care provider, consultancy and bid-management service can use the same framework without performing the same work.

That flexibility is useful and uncomfortable. It means the standard will not tell you how many bid reviews to run, what to call a gate, which fields belong in a compliance matrix or whether the pricing director should sign before the managing director. The organisation must decide what is necessary to achieve intended results and meet applicable requirements.

An auditor can assess whether the decision is effective and conforms to the standard. The auditor should not design the bid process for you.

The clause structure in working language - The principal requirements sit in clauses 4 to 10. You should read the authorised standard itself, but the working logic can be summarised without reproducing it.

Clause 4 - Context. Understand the organisation and relevant interested parties. Define the QMS scope. Determine the processes and how they interact.

Clause 5 - Leadership. Top management remains accountable. Customer focus, policy, responsibilities and authority must be real, not delegated into a corner.

Clause 6 - Planning. Address risks and opportunities, set quality objectives and plan changes.

Clause 7 - Support. Provide people, infrastructure, environment, monitoring resources, knowledge, competence, awareness, communication and controlled documented information.

Clause 8 - Operation. Plan and control the work. Communicate with customers, determine and review requirements, design where applicable, control external providers, produce and release services, and deal with nonconforming outputs.

Clause 9 - Performance evaluation. Decide what to monitor and measure. Evaluate customer perception, analyse data, conduct internal audits and hold management reviews.

Clause 10 - Improvement. Respond to nonconformity, take corrective action and improve the suitability, adequacy and effectiveness of the QMS.

For a bid operation, these clauses are not separate departments. Clause 4 shapes the pursuit model. Clause 6 appears in qualification and planning. Clause 8 is the live bid. Clause 9 watches the process. Clause 10 changes it.

PDCA is not a poster - The Plan-Do-Check-Act cycle becomes useful when applied to real decisions.

Plan: understand requirements, objectives, risks, resources, methods and acceptance criteria.

Do: carry out the planned work and control changes.

Check: monitor results, verify outputs, review evidence and compare performance with requirements and objectives.

Act: correct failure, address causes, improve the process and update the system.

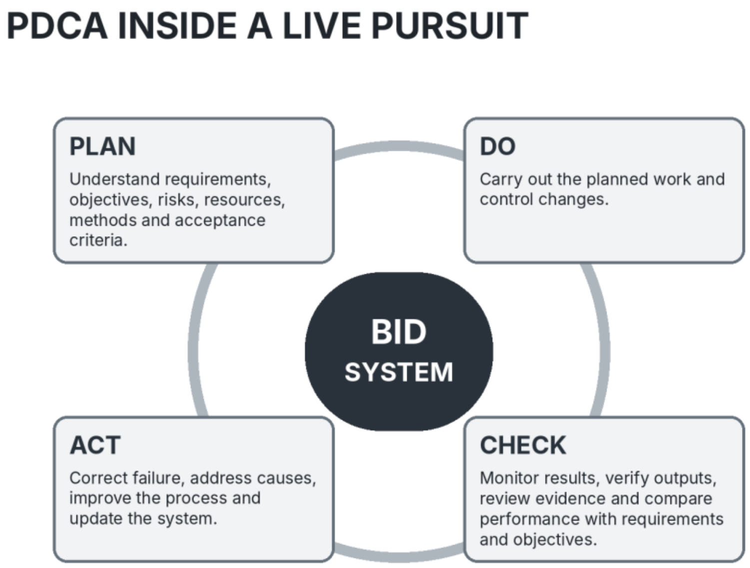

FIGURE 2 | PDCA INSIDE A LIVE PURSUIT

A bid contains several PDCA cycles at once. The overall pursuit is planned, developed, reviewed and improved. A solution design has its own cycle. So does pricing. So does a single answer.

The mistake is to compress 'Check' into the last two days and 'Act' into a lessons-learned meeting that nobody attends.

A proposal manager at Calder Rail used a simple visual. Every major workstream had four columns on the campaign board: decision, production, evidence, closure. When a clarification changed the service period, the team could see which decisions and outputs had to move back into planning. They did not treat the clarification as a document update. It was a change to the system.

Risk-based thinking is proportion, not panic - ISO 9001 does not require a theatrical risk register for every paragraph. It requires risk and opportunity to influence how processes are planned and controlled.

High-risk activities deserve greater clarity, competence, verification and evidence. Low-risk routine work can be controlled more lightly.

In bid management, risk may arise from mandatory participation conditions, unfamiliar contractual liabilities, short response periods, unverified evidence, novel technology, partner dependency, sensitive data, complex pricing, mobilisation constraints or a customer requirement the organisation has never delivered.

Opportunity matters as well. A reusable evidence card may reduce effort across future pursuits. A controlled interview process may improve subject-matter engagement. A win-loss taxonomy may reveal that the organisation is qualifying well but reviewing too late.

Risk-based thinking should affect action. A red flag that sits in a spreadsheet while the bid proceeds unchanged is a colour, not a control.

The 2024 climate amendment - The 2024 amendment added an explicit requirement for organisations to determine whether climate change is a relevant issue within their context. It also reminded users that relevant interested parties may have climate-related requirements.

For a bid process, this does not mean adding a generic carbon paragraph to every tender. It means asking whether climate change affects the QMS context, customer requirements, service continuity, supply chain, infrastructure, travel, data centres, materials, workforce, delivery risk or the opportunities being pursued.

A print supplier may face customer requirements on paper sourcing, transport, waste and carbon reporting. A facilities business may need to consider heat, flooding and service resilience. A digital consultancy may find that clients expect evidence about cloud energy use or climate-related continuity risks. A bid team may also need current, controlled environmental evidence because buyers increasingly test it.

The relevance determination should be reasoned and reviewed. 'Not relevant' is not forbidden. It simply needs to survive a sensible question.

The 2026 edition is coming - At the date of this book, ISO's sixth edition was under publication and expected to replace ISO 9001:2015 in September 2026. Certified organisations will receive transition arrangements. The correct response is neither to freeze implementation nor to guess final requirements from rumours.

Build the fundamentals now. Keep a standards-change register. Assign somebody to obtain the published edition, compare requirements, assess impact and plan transition through normal change control.

A robust bid process should not collapse because clause wording moves. If it understands customers, controls requirements, manages risks, retains evidence, measures performance and improves, much of the work will remain useful.

Implementation is different from certification - An organisation can implement ISO 9001 principles without seeking certification. Certification is an independent assessment of conformity within a defined scope by a certification body. In the United Kingdom, organisations commonly seek certification from bodies accredited by UKAS, and certification status can be checked through UKAS CertCheck where applicable.

Do not confuse the roles. ISO develops standards. UKAS accredits competent conformity-assessment bodies in the UK system. Certification bodies audit and certify organisations. Consultants may help organisations implement, but they should not certify their own work.

The decision to certify should have a business reason: customer expectation, tender access, governance, assurance, market credibility or internal discipline. 'Because competitors have it' may be part of the reason, but it is not an implementation plan.

The scope trap - Some businesses try to certify only the bid department because tenders ask for ISO 9001. That may be possible in a clearly bounded organisational unit, but the scope must reflect actual activities, interfaces and control. More often, the bid process is one process within a broader QMS covering the products or services sold and delivered.

A certificate whose scope says 'provision of facilities management services' cannot be treated as proof that every tender response is accurate. It can show that the organisation operates a certified QMS within that scope. The bid still needs opportunity-specific control.

Equally, a bid team providing bid-management services to external clients may legitimately include those services within its QMS scope. The process would then cover enquiry, contract review, planning, client information, writing, review, submission support, change, confidentiality, feedback and improvement.

Scope should be honest, useful and understandable.

Documentation is not the objective - ISO 9001 uses the term 'documented information' because records and instructions may exist in many forms: workflow systems, databases, templates, dashboards, process maps, software controls, meeting records, videos or conventional documents.

The organisation determines what it needs, alongside any explicit requirement in the standard and any customer, legal or regulatory obligation.

The bid team's compliance matrix may be documented information. So may the opportunity record, gate decision, review log, evidence library, approved pricing model, release record and submission receipt. A Teams workflow can be part of the QMS if it is controlled and understood. A printed procedure in a cupboard is not automatically more compliant.

Ask what confidence the information must provide. If a reviewer needs to know which clarification changed a requirement, the system should retain the source, decision, affected outputs and approval. If nobody needs a daily status report after the bid closes, do not keep it forever because a template once existed.

The anti-wallpaper test - Take any policy, procedure or process description and ask five questions.

1. Who uses this during live work?
2. What decision or risk does it control?
3. What evidence shows it was followed?
4. What happens when reality differs?

5. When was it last changed because performance taught us something?

If nobody can answer, the document is wallpaper.

Wrenford Digital cut its quality manual from forty-six pages to twelve. That was not the improvement. The improvement was that the supplier-information review gained an owner, turnover data came from one approved source, schedule values were reconciled before release and every deviation was visible.

The next framework application did not mention the shorter manual.

It simply contained the same numbers everywhere.

CHAPTER 3

APMP and ISO: Two Views of the Same Pursuit

CASE FILE

At Northline Print, the quality manager and proposal manager spent six months politely avoiding each other.

The quality manager believed the bid team worked outside process. The proposal manager believed quality arrived after the useful work and asked for signatures. Both had evidence.

The proposal team used capture plans, compliance matrices, answer plans, colour reviews and submission checklists. The quality team used process maps, objectives, audit schedules, corrective actions and management reviews. The language differed enough for each side to miss the overlap.

Then a framework win handed delivery an unpriced reporting commitment. The argument became shorter.

Different disciplines, different jobs - APMP is a professional association for people who win business through bids, proposals, tenders, capture and related work. Its Body of Knowledge and learning resources describe practices used across the pursuit lifecycle. ISO 9001 is a management-system requirements standard.

APMP practice helps answer bid-specific questions. How should an opportunity be qualified? What belongs in a capture plan? How can a compliance matrix be used? When should reviews occur? How do win themes, customer insight, pricing, writing and production fit together?

ISO 9001 asks how the organisation ensures these activities are understood, resourced, controlled, measured and improved. It asks who owns the process, what evidence remains, how changes are managed, whether external providers are controlled, how competence is established and how leadership knows the system is effective.

One is not a substitute for the other.

A team can follow APMP-style practices inconsistently, with no measurement or corrective action. It can also hold ISO 9001 certification while using a weak pursuit method. The useful system combines professional method with management discipline.

The APMP Winning Business Ecosystem - APMP's current public model describes four broad areas: pre-bid and capture; bid and proposal; post-bid and proposal; and implementation.

The pre-bid and capture stage includes identifying opportunities, understanding customers and markets, qualifying pursuits, developing strategy, positioning against competitors, identifying partners and assembling resources.

The bid and proposal stage includes reviewing the solicitation, building a compliance matrix, planning milestones and responsibilities, developing content, conducting reviews, aligning price and strategy, performing final quality checks and submitting correctly.

The post-bid stage includes evaluation support, clarification, negotiation, award or debrief and transition.

Implementation includes mobilisation, contract administration, deliverables, change control, closeout, lessons and continuing relationships.

That final stage is important. Bid practice often stops at the receipt. ISO 9001 refuses to stop there because customer satisfaction, nonconformity, performance and improvement depend on what happens after the promise is accepted.

The crosswalk in plain language - Consider qualification.

APMP practice gives the gate substance: customer, opportunity, competition, solution fit, return, risk, resource and probability. ISO 9001 gives the gate control: criteria, authority, evidence, retained decision, review after change and performance measurement.

Consider a compliance matrix.

APMP practice explains how to decompose and track solicitation requirements. ISO 9001 connects that matrix to customer requirements, operational planning, documented information, change control, verification and release.

Consider a red review.

APMP practice gives the review a pursuit purpose. ISO 9001 asks whether reviewers are competent and sufficiently independent, whether acceptance criteria are defined, findings are recorded, corrections are completed and recurring failures lead to corrective action.

Consider handover.

APMP treats transition into delivery as part of the winning-business lifecycle. ISO 9001 links it to operational control, customer communication, design outputs, release, externally provided processes, performance monitoring and improvement.

The alignment is not forced. The two disciplines are looking at the same work from different sides.

A process is more than a calendar - Northline's proposal manager showed the quality manager a standard bid schedule. It contained kick-off, first draft, pink review, red review, gold review, production and submission.

'Here is the process,' she said.

It was a useful calendar. It was not yet a full process description.

The quality manager asked what entered each stage, what result was expected, who could accept it, what happened when it failed, which records remained and how the company knew the schedule itself was effective.

The proposal manager was irritated for about four minutes.

Then she noticed that the first-draft milestone had no acceptance criteria. Writers could submit anything and mark the task complete. Reviewers spent the pink review discovering that half the questions had no solution. The calendar measured dates, not readiness.

They changed the milestone. A first draft was complete only when every question component had a visible response, evidence gaps were flagged, assumptions were named and no placeholder was hidden in white text. On-time first drafts initially fell from 82 per cent to 49 per cent.

Management was alarmed.

The old measure had been false. Within three months, genuine completion reached 76 per cent and red-review defects fell.

ISO did not replace the APMP review cycle. It made the cycle measurable.

Artefacts should have one clear job - Bid teams accumulate templates quickly. There is a capture plan, pursuit plan, proposal plan, compliance matrix, content plan, story board, review form, risk register, action log, decision log, evidence tracker, partner tracker, pricing checklist and handover pack.

Some are valuable. Some contain the same information under different headings.

The integrated system asks three questions before creating another artefact.

What decision or process does it support? Who uses it? Which existing record could hold the information without losing control?

A small organisation may combine opportunity qualification, key risks and resource approval in one gate record. A complex consortium may need separate controlled artefacts with defined interfaces. Both can conform if the system is effective and requirements are met.

Avoid two extremes. Do not force every APMP practice into a separate ISO procedure. Do not compress everything into one spreadsheet that only its author understands.

Colour reviews need defined purposes - APMP's public lifecycle refers to colour-team reviews such as Pink, Red and Gold. Organisations use the names differently. The colour is less important than the review question.

A solution or strategy review may ask whether the proposed approach can win and be delivered. An outline review may test coverage, story and evidence before full drafting. A red review may assess the near-complete response through an evaluator's eyes. A gold or final review may confirm executive position, material risk and release readiness.

Problems begin when everybody attends a 'red review' with a different definition. One person edits grammar. One questions the solution. One reopens pricing. One expects final approval. Findings cannot be prioritised because the review never had a single purpose.

Define for each review:

- objective and maturity expected;
- inputs that must be available;
- reviewer competence and independence;
- criteria and scoring method;
- outputs and finding categories;
- authority to accept, reject or escalate;
- closure evidence;
- timing relative to irreversible decisions.

That is APMP practice under process control.

Capture belongs inside the QMS - Some ISO systems begin when the tender arrives. By then, the organisation may already have made the important mistakes.

It may have pursued the wrong customer, accepted a weak route to market, promised an unsuitable partner, assumed a budget, misread an incumbent position or allowed leadership enthusiasm to replace qualification.

Pre-bid activity affects the ability to meet customer requirements. It therefore belongs within the process, even if the exact controls are lighter before a formal solicitation exists.

Customer contact must also be lawful and ethical. The integrated process records sources, separates evidence from assumption and respects procurement boundaries. 'Relationship' is not a control. A named, published customer requirement supported by a traceable source can be.

ISO belongs after submission - The bid team at Northline used to archive the final file and move on. Delivery received a handover meeting if diaries allowed. Win and loss reviews happened when somebody felt strongly enough to organise one.

The integrated lifecycle changed the endpoint.

On submission, the team retained the released baseline, receipt, assumptions, departures, pricing approval, partner commitments and promise register. If clarification arrived, changes were controlled against that baseline. On award, mobilisation accepted the promise register and raised questions before contract start. On loss, the score and feedback were compared with review predictions. On delivery, performance data was tagged for future evidence.

The bid ceased to be a temporary event. It became one cycle in a system of winning and delivering work.

The integrated gate model - A practical organisation can use six gates without turning the pursuit into a military parade.

Gate 0 - Market relevance. Is this market, framework or customer consistent with strategy and capability?

Gate 1 - Opportunity qualification. Is the specific opportunity worth controlled pursuit?

Gate 2 - Strategy and solution commitment. Do leadership and delivery support the win strategy, partners, resources and commercial boundaries?

Gate 3 - Planned response readiness. Are requirements understood, responsibilities assigned, evidence available and the production route credible?

Gate 4 - Submission release. Does the approved output meet requirements and defined acceptance criteria?

Gate 5 - Result and transition. What must happen after submission, award, loss, delay or clarification?

FIGURE 3 | THE INTEGRATED SIX-GATE ROUTE

Each gate should be proportionate. A £40,000 local contract may need a twenty-minute recorded decision. A ten-year national service may require board approval and several supporting analyses. The principle remains: the organisation knows what decision is being made, by whom, using what evidence and with what consequence.

The language bridge - Quality and bid professionals often agree once they translate their terms.

'Compliance matrix' becomes control of customer requirements and documented information.

'Win theme' becomes a designed proposition that must be supported by evidence and consistent with outputs.

'Colour review' becomes verification, validation and release activity with defined criteria.

'Lessons learned' becomes evaluation, nonconformity, corrective action and improvement.

'Capture intelligence' becomes organisational knowledge, customer communication and controlled external information.

'Bid library' becomes documented information and organisational knowledge with ownership, approval, currency and access control.

'Bid/no-bid' becomes risk-based operational planning and leadership decision.

The bridge should work both ways. Quality language must not erase professional bid craft. Bid language must not excuse missing governance.

A thirty-day integration exercise - For one month, do not redesign the entire QMS. Select one live pursuit and map every APMP-style activity to the management-system controls already in place.

Week one: identify the pursuit stages, decisions, owners, inputs and outputs.

Week two: connect requirements, evidence, design, pricing, reviews and release to existing document control, competence, supplier and risk processes.

Week three: define measures and records. Remove duplicate templates.

Week four: run a short internal audit following the opportunity from source to current status. Record findings in working language.

Northline found thirteen duplicate fields, two missing authorities and one excellent partner-control process that quality had never seen. The quality manager stopped asking the team to use an irrelevant corporate form. The proposal manager stopped calling audit 'the paperwork inspection'.

They were not finished.

They were finally working on the same system.

CHAPTER 4

Context, Scope and Interested Parties

CASE FILE

> Cedar Care's first ISO workshop began with a SWOT analysis copied from its strategic plan.
>
> Strengths: experienced people. Weaknesses: limited resources. Opportunities: growth. Threats: competition.
>
> Nobody disagreed because nothing had been said.
>
> The quality consultant moved on to interested parties. The team listed customers, staff, suppliers and regulators. Again, correct. Again, almost useless.
>
> Then the bid manager mentioned that two commissioners had begun asking for mobilisation evidence against severe winter disruption. Operations described a shortage of registered managers. Finance raised the effect of delayed public-sector payments on agency staffing. The information-security lead said bid writers were placing personal data into an unapproved AI tool.
>
> The context arrived late, but it arrived.

Context is the ground the process stands on - ISO 9001 asks the organisation to determine the external and internal issues relevant to its purpose, strategic direction and ability to achieve the intended results of the QMS. It does not require a particular analysis format.

A SWOT can help. So can PESTLE, risk workshops, management discussions, market data, contract reviews, audit findings, customer feedback and ordinary operational knowledge. The method matters less than whether the analysis changes the system.

For end-to-end bid management, external issues may include procurement law and policy, customer buying behaviour, market concentration, inflation, labour availability, technology, cybersecurity, social-value expectations, climate-related requirements, supply-chain capacity and competitor behaviour.

Internal issues may include strategy, financial appetite, competence, culture, systems, evidence quality, delivery performance, leadership availability, partner dependency, workload and the organisation's history of keeping tender promises.

The analysis must be relevant. A bid team does not need a lecture on every global trend. It needs to know which conditions alter opportunity selection, solution design, evidence, price, risk, delivery or customer confidence.

The test is consequence - A useful context statement contains a consequence.

'Inflation remains high' is background.

'Framework rates are fixed for two years while labour and transport costs can move; therefore qualification requires a stress-tested minimum margin and a formal position on indexation' is context being managed.

'AI is developing quickly' is background.

'Writers are using public generative-AI tools with client documents; therefore approved tools, data classification, training and output verification are required' is context being managed.

'The public sector values social value' is background.

'Several target authorities use scored social-value models and require contract-specific, measurable commitments; therefore commitments need an owner, cost, baseline and evidence before submission' is useful.

If the issue does not affect a process, objective, risk, resource or decision, it may not deserve space in the QMS.

Climate change belongs in the same conversation - The 2024 amendment requires an explicit determination of whether climate change is a relevant issue. Relevant interested parties may also have climate-related requirements.

Do not answer this with a standard sentence prepared for auditors. Ask what climate change could alter in the bid and delivery system.

For Cedar Care, severe weather could interrupt transport, increase demand, affect staff availability and expose vulnerable service users. Commissioners expected continuity planning. The organisation therefore added climate-related disruption to opportunity risk reviews, mobilisation design and continuity evidence. It also monitored buyer requirements around carbon reporting and local travel.

For a remote software consultancy, direct operational exposure might be lower, yet customer requirements on hosting, energy use, resilience and environmental reporting could still be relevant. For a print and logistics business, material sourcing, energy, waste, transport and extreme weather may be central.

A relevance decision can be brief. It should not be automatic.

Interested parties are not a Christmas-card list - An interested party is relevant when its requirements, needs or expectations matter to the QMS and the organisation's ability to provide conforming products and services.

The contracting authority is relevant. So are service users where their needs shape the requirement. Employees matter because competence, workload and safe challenge affect bid quality. Delivery teams matter because they inherit commitments. Regulators, professional bodies, certification bodies, partners, subcontractors, data subjects, shareholders and insurers may also matter depending on the scope.

The mistake is to list everyone and monitor nothing.

Cedar Care built a simple interested-party register with five fields:

- interested party or group;

- relevant requirement or expectation;
- source of the requirement;
- process affected;
- method and frequency of monitoring.

Commissioners expected safe, continuous and outcome-focused care. Sources included tender documents, contracts, market engagement and feedback. The bid process translated those expectations into qualification, design, evidence and review criteria.

Employees expected manageable workload, clear authority and access to information. The organisation monitored capacity, missed actions, rework and staff feedback rather than writing 'our people are our greatest asset' in another policy.

The certification body expected conformity with the chosen standard and access to objective evidence. That requirement affected audit planning and documented information. It did not give the certification body authority to write Cedar Care's procedures.

Customer requirements begin before the question - A tender contains explicit requirements. Context and interested-party analysis help the organisation recognise the less obvious conditions around them.

A council may ask for a mobilisation plan. Its wider context may include recent supplier failure, political scrutiny, a hard budget cycle and workforce shortages. Those facts do not permit the bidder to invent evaluation criteria. They do help the team understand why evidence, continuity and transparent assumptions matter.

An NHS buyer may specify response times. Service users and clinical teams may also need communication that works under stress, accessible routes and clear escalation. The bid should remain traceable to the published criteria, but the solution can be designed with the real service in view.

This is where capture practice and ISO context meet. Customer insight is valuable when sourced, relevant and ethically obtained. It becomes dangerous when rumour is promoted to requirement.

Keep three columns in the capture record: known, inferred and unknown. Do not let a confident stakeholder move an item between them without evidence.

Define the QMS scope honestly - Scope describes the boundaries and applicability of the QMS. It should identify the products and services covered, relevant organisational boundaries and justified non-applicable requirements.

A bid consultancy might use:

> *> Provision of bid management, tender writing, capture support, proposal review and related commercial advisory services to public- and private-sector suppliers.*

A wider supplier might use:

> *> Provision, mobilisation and management of integrated facilities services across the United Kingdom, including the supporting sales, bid, procurement, contract and corporate processes.*

The second scope makes the bid process part of a broader system. That is usually stronger because bidding, delivery and customer feedback remain connected.

Avoid scopes written solely to satisfy a tender. If the organisation does not control a service, do not imply that it does. If a location or business unit is excluded, understand the interfaces. If outsourced activity affects conformity, outsourcing does not remove responsibility.

Applicability is not convenience - ISO 9001 permits requirements to be considered not applicable where they do not affect the organisation's ability or responsibility to ensure conformity and customer satisfaction. This is not a casual exclusion list.

Design and development under clause 8.3 often causes debate in bid environments. A supplier may argue that it only delivers customer-defined services. Yet if the organisation designs a solution, configures a service model, creates a mobilisation approach, combines resources or develops a customer-specific method, design controls may be relevant.

A reseller providing a fixed product without altering specification may reach a different conclusion. Even then, it should examine whether service design, implementation or integration occurs.

The decision must follow the work.

At Cedar Care, every tender produced a customer-specific operating model, staffing pattern and mobilisation plan. Clause 8.3 was applicable. The organisation did not need an engineering design department. It needed controlled design inputs, reviews, outputs and changes.

Scope the bid process itself - For process design, define where end-to-end bid management starts and ends.

Does it begin with market monitoring, a qualified lead or formal receipt of documents? Does it end at submission, award, mobilisation handover or contract close-out?

A narrow definition can leave serious risk outside control. If the process begins only when an invitation arrives, capture assumptions may escape. If it ends at submission, tender promises may never reach delivery.
A practical boundary is:

> *> From identification of a potential opportunity through qualification, capture, response planning, solution and commercial development, writing, review, release, submission and post-submission activity, to controlled transition into delivery or closure and learning after an unsuccessful result.*

That is long. It is also honest.

Monitor context without holding another meeting - Context and interested parties are not annual workshop decorations. They need review when conditions change and at planned intervals.

Use existing management routes. Pipeline reviews reveal market change. Contract reviews reveal delivery and customer change. Risk reviews reveal operational exposure. Internal audits reveal process weakness. Management review brings the picture together.

Create triggers as well:

- a new law, standard or procurement policy;
- entry into a new sector or geography;
- major customer loss or complaint;
- repeated bid failure;
- acquisition or restructuring;
- introduction of AI or another significant technology;
- material supplier failure;
- climate-related event affecting operations;
- change to certification scope.

When a trigger occurs, assess impact. Do not merely update a date in the context register.

A two-hour context workshop - Invite leadership, business development, bidding, delivery, finance, quality, legal or contracts, IT and one person close to day-to-day operations. Keep the group small enough to speak.

First thirty minutes: list changes that have affected bids or delivery during the past twelve months.

Second thirty minutes: identify relevant interested-party requirements and where they come from.

Third thirty minutes: test the proposed QMS scope and process boundary against actual work.

Final thirty minutes: choose actions, owners, dates and monitoring routes.

Do not spend the session polishing wording.

Cedar Care finished with nine context issues, seven relevant interested-party groups, one revised scope and four actions. The most important action was not about certification. It was to involve operations at Gate 2 before staffing models entered the tender.

The ground had changed. The process finally noticed.

CHAPTER 5

Map the End-to-End Process

CASE FILE

> Falcon Engineering's first process map looked magnificent on an A3 sheet.

> Twenty-three boxes. Six colours. Arrows crossed in several directions, one disappeared behind the company logo and nobody could explain why 'commercial review' happened after 'final approval'.
>
> The map had been designed by a person who did not run bids.
>
> A bid coordinator took a pencil and drew what actually happened. Opportunity found. Documents downloaded. Director excited. Bid manager checks requirements. Finance asks for more time. Delivery changes the solution. Director changes it back. Files uploaded. Everyone sleeps.

> It was not a mature process, but at least it moved in the correct direction.

Map decisions before activities - Process maps become crowded because organisations try to record every task. Begin with decisions and outputs.

For an end-to-end bid process, the major decisions might be:

- is the market or route relevant;
- should the opportunity be pursued;
- what is the customer and competitive strategy;
- what solution and commercial position will be offered;
- is the planned response ready to produce;
- does the developed submission meet requirements;
- is the final output authorised for release;
- what happens after result.

Between those decisions sit activities. The map should show enough detail to understand sequence, interaction and control, but not every mouse click.

A useful top-level map can fit on one page. Supporting process cards provide depth.

The fifteen-stage pursuit - Falcon settled on fifteen stages:

1. market and pipeline monitoring;
2. opportunity capture;
3. initial triage;
4. qualification and leadership gate;
5. capture and customer strategy;
6. solicitation receipt and document baseline;
7. requirements and contract review;
8. bid planning and resource mobilisation;
9. solution and commercial design;
10. answer planning and content development;

11. review and controlled correction;
12. production, release and submission;
13. clarification, presentation or negotiation;
14. award transition or loss review;
15. delivery feedback and evidence renewal.

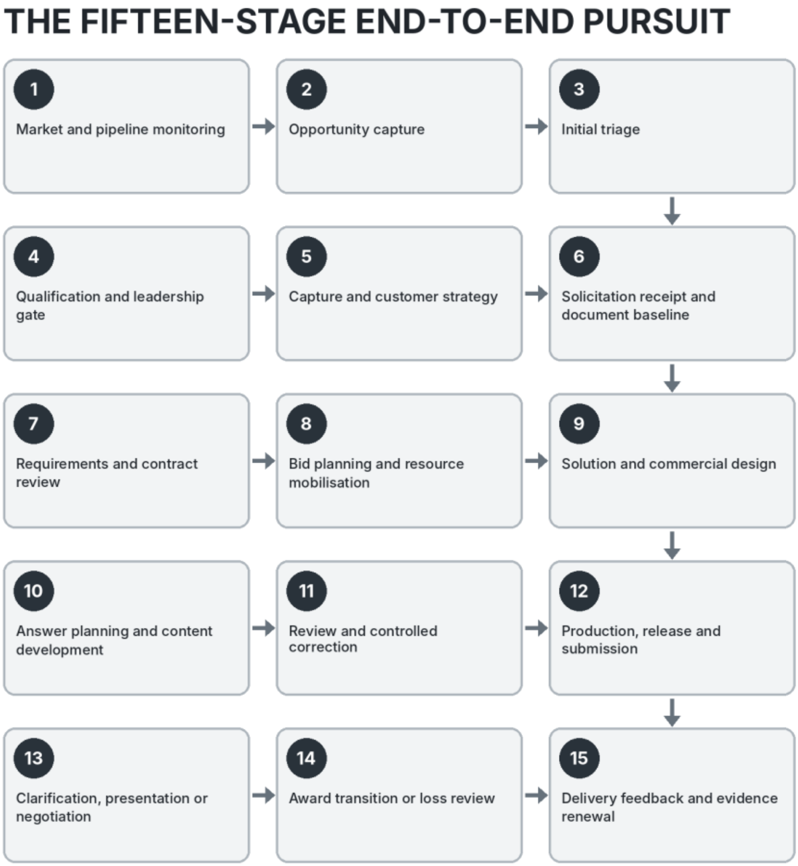

FIGURE 4 | THE FIFTEEN-STAGE END-TO-END PURSUIT

Not every opportunity needs every stage in the same depth. The stages still provide a common route.

A short call-off might move through stages six to twelve in five working days because market and framework qualification already exist. A strategic procurement may spend six months in capture before the solicitation arrives.

The process adapts. It does not disappear.

Use the turtle, not just the arrow - A process map shows sequence. A process card explains control. One helpful structure is sometimes called a turtle diagram because inputs and outputs sit at either end while resources, methods, measures and responsibilities sit around the process.

You do not need to draw a turtle.

For each material process or stage, record:

Purpose. Why does this process exist?

Inputs. What must be available and trustworthy before work starts?

Activities and decisions. What happens, and which decisions cannot be assumed?

Outputs. What result must be produced, for whom and in what condition?

Owner and participants. Who is accountable, who performs and who approves?

Resources and competence. What people, information, tools, time and environment are needed?

Criteria and methods. How is the process controlled and how is an acceptable output recognised?

Risks and opportunities. What could prevent the intended result or improve it?

Measures. What information indicates performance and effectiveness?

Documented information. What instructions or records must be maintained or retained?

Interactions. Which other processes provide inputs or receive outputs?

The card should be understood by the people doing the work. If it requires an interpreter, simplify it.

Example: opportunity qualification - Purpose: decide whether to invest in a specific pursuit and under what conditions.

Inputs: opportunity notice or lead, customer information, strategic fit, scope, value, timetable, competition, capability, capacity, risk and commercial assumptions.

Activities: validate information, assess criteria, identify gaps, consult delivery and finance, decide bid, conditional bid, partner or no-bid.

Outputs: recorded decision, owner, conditions, resources, risks and next gate date.

Criteria: minimum compliance, strategic fit, deliverability, evidence, commercial return, capacity, ethical position and realistic route to win.

Measures: gate cycle time, late withdrawals, overrides, win rate by gate score, bid cost and post-award performance.

Records: gate form, decision rationale, approval and conditions.

Interactions: strategy, sales, finance, operations, legal, partners and pipeline management.

Notice what is absent. There is no requirement for a twelve-page form.

Sequence matters at the handovers - Most process failures occur between functions rather than inside a familiar task.

Sales passes an opportunity to bidding without recording what the customer actually said. Bidding asks operations for a solution without providing evaluation criteria. Operations provides a service model without a cost basis. Finance changes assumptions without telling the writer. Reviewers identify a risk but nobody owns closure. The final submission is handed to delivery without the departures or promises.

Map each handover with four questions:

- what information moves;
- in what condition;
- who accepts it;
- what happens if it is incomplete.

Falcon's commercial model could not begin until the solution lead issued an approved resource basis. Previously finance worked from a slide deck and later blamed the bid team when headcount moved. The new handover required a dated input sheet with assumptions and owner. Finance could reject it. That small right prevented larger arguments.

Decide what 'ready' means - Dates alone do not control readiness.

A kick-off held on time may still fail if the team lacks the full document set, scope decision, roles or initial compliance analysis. A first draft may exist but contain placeholders instead of evidence. A red review may begin while pricing and solution are still open.

Define entry and exit criteria for material stages.

For bid planning, entry might require a confirmed decision to pursue, document baseline, named bid lead and initial risk assessment. Exit might require an approved plan, responsibilities, schedule, review strategy, working environment and issue route.

For final release, entry might require closed material review findings, reconciled price, approved commitments and completed production checks. Exit requires authorised submission files and a release record.

Criteria should be proportionate and observable. 'High quality' is not an exit criterion. 'All mandatory schedules complete and independently checked' can be tested.

Parallel work needs control, not denial - Bids rarely progress in a clean line. Solution, price, evidence and writing develop together. That is not a failure of process design. It is the reason interactions must be explicit.

Use controlled iteration. A solution change should trigger review of price, narrative, risk, partner scope and implementation. A clarification may reopen requirements and design. New evidence may strengthen a claim without changing the solution.

The process needs impact assessment rather than a rule that nothing may ever move backwards.

Falcon added change flags to its campaign board. A red flag meant customer requirement changed. Amber meant internal design or commercial change. Blue meant evidence or presentation change. The colours were less important than the affected-output list attached to each flag.

The team stopped saying, 'It is only a small change.'

Core, support and management processes - The bid process does not operate alone.

Core or operational processes directly create the bid service and output: qualification, capture, solution design, proposal development, review, submission and handover.

Support processes provide capability: competence, IT, document control, knowledge, finance, procurement, legal support, data protection and facilities.

Management processes set direction and evaluate the system: strategy, objectives, risk, internal audit, management review and improvement.

Do not create a process for every ISO clause. Map how the organisation actually works, then show where requirements are addressed.

A clause-by-clause process map usually produces artificial islands. Nobody wakes up and performs 'Clause 7.1.6 Organisational Knowledge' for forty minutes. They retrieve approved evidence, interview an expert, update a case study or learn from delivery. The requirement lives through those processes.

Scale the process to opportunity risk - Falcon classified pursuits as Standard, Enhanced or Strategic.

A Standard pursuit used the core gate, compliance matrix, plan, review and release controls. An Enhanced pursuit added formal solution review, contract risk, partner review and executive sign-off. A Strategic pursuit added capture governance, independent reviews, scenario testing, board approval and mobilisation rehearsal.

Classification considered value, complexity, novelty, contractual exposure, customer criticality, delivery scale, information sensitivity, partner dependency and timetable.

The system did not say that small bids were unimportant. A low-value pilot with high strategic or reputational consequence could be Enhanced. A large repeat call-off with stable scope might remain Standard.

Risk, not ego, selected the route.

The process owner is not the person doing everything - A process owner is accountable for the design, performance and improvement of the process. The owner does not need to perform every activity or approve every bid.

Typical responsibilities include:

- maintaining the process and controls;
- ensuring roles and interfaces are defined;
- monitoring performance and risk;

- resolving cross-functional issues;
- sponsoring corrective action;
- reporting through management review;
- ensuring changes remain controlled.

The bid director may own end-to-end bid management. Stage owners may include sales, capture, solution, commercial, proposal, production and mobilisation leads.

Authority needs edges. Who can override a no-bid? Who can accept a contract departure? Who releases the submission? Who may reopen a frozen document? If two people believe they hold the same authority, the process is already late.

Measures should reveal the process - A map without measures is a description. Choose indicators that show whether the process achieves intended results.

Possible measures include:

- opportunities qualified within target time;
- percentage of pursuits re-gated after material change;
- requirement defects found late;
- first-draft readiness;
- review findings by severity and cause;
- pricing-narrative inconsistencies;
- submissions released before contingency;
- portal or production defects;
- commitment handover completed on time;
- forecast versus actual bid cost;
- win rate by opportunity class and gate decision;
- delivery nonconformities linked to tender promises;
- evidence items updated from contract performance.

Do not use all of them. Select a balanced set connected to objectives and risk.

A team can improve deadline compliance by starting earlier, or by lowering review depth, or by marking incomplete work complete. One number rarely tells the whole truth.

Walk the map with a live bid - Print the top-level process. Place a current opportunity at the start. Ask the owner of each stage to show the input, decision, output and record.

Do not accept 'we normally'. Ask for the current example.

Where is the gate decision? Which document baseline is authoritative? Which assumptions remain open? What evidence has been approved? Which review findings are material? Who authorised release?

Falcon's map changed three times during the walk-through. A missing contract-review interaction appeared. The handover moved earlier. One review was removed because it duplicated another without a distinct purpose.

The finished map was less attractive than the original A3 artwork.

People could use it.

CHAPTER 6

Leadership, Policy, Objectives and Roles

CASE FILE

West Quay Training had a quality policy signed by the chief executive.

It promised customer satisfaction, continual improvement, competent people and compliance with requirements. The words were respectable. The chief executive could not remember approving them.

During a live bid, the same chief executive asked the team to remove a risk from the gate record because 'the board does not need every problem'. He then added three unpriced services to the executive summary at 22:40.

Leadership was present. Direction was not.

Top management cannot outsource accountability - ISO 9001 places accountability for QMS effectiveness with top management. A quality manager can coordinate the system. A bid director can own the process. Neither can replace leadership decisions about strategy, resources, customer focus, risk and priorities.

In bid management, leadership influence is direct. Executives approve pursuits, allocate scarce experts, set commercial appetite, choose partners, accept departures and sometimes change the offer. Their behaviour determines whether controls survive pressure.

A leader who demands compliance but rewards late improvisation teaches the real policy in one evening.

Customer focus has operational consequences - Customer focus is not agreement with every customer request. It is sustained attention to applicable requirements, customer satisfaction, risks and opportunities affecting conformity.

For a bid process, leadership should ensure that:

- customer and procurement requirements are understood;
- legal and contractual risk is not hidden;
- the offer can be delivered;
- claims are supported;
- resources match commitments;
- customer feedback and contract performance influence future bids;
- commercial pressure does not erase ethical or compliance boundaries.

West Quay pursued a national training framework despite lacking tutors in two regions. The managing director described this as ambition. Operations described it as a recruitment dependency. The quality objective was not 'be ambitious'. It was to submit only delivery models supported by named capacity or an approved mobilisation route.

Customer focus sometimes requires saying no before the customer has to.

Write a policy people can use - A quality policy should fit the organisation's purpose and context, support strategic direction, provide a framework for objectives, include commitments to applicable requirements and continual improvement, and be communicated and understood.

It does not need to be long.

West Quay replaced its generic policy with four commitments:

> *> We pursue work that fits our strategy and can be delivered responsibly.*
>
> *>*
>
> *> We turn customer requirements into clear, controlled and evidenced commitments.*
>
> *>*
>
> *> We involve the people who will deliver before promises are released.*
>
> *>*
>
> *> We measure results, correct failure and improve the system rather than repeat the explanation.*

The formal policy also contained the required management-system commitments, but the language stayed close to the work.

A useful test is to place the policy beside a difficult gate decision. Does it help leadership choose? If not, it may be compliant in shape and empty in practice.

Objectives need a baseline and an owner - 'Improve bid quality' is not an objective. It is a hope with no meeting date.

A quality objective should state what will be achieved, how it will be measured, who owns it, what resources are needed, when it will be completed and how results will be evaluated.

Examples:

- reduce material compliance defects found after red review from an average of 4.2 per bid to fewer than 1.5 by 31 December;
- complete mobilisation handover within two working days of every award, with 100 per cent of material commitments assigned;
- increase the proportion of high-impact evidence items with current owner, source and approval from 58 per cent to 90 per cent within six months;
- reduce executive changes after content freeze by half while retaining a formal emergency route;
- re-gate every Enhanced and Strategic pursuit after final contract review.

Objectives should not encourage damage elsewhere. A target to increase bid volume may reduce qualification quality. A target to shorten writing time may increase rework. Balance speed, quality, commercial result and delivery consequence.

Leadership reviews the system, not every comma - Senior involvement is necessary. Constant executive editing is not.

Define where leadership adds value:

- strategic market and customer decisions;
- pursuit approval and conditions;
- commercial boundaries;
- major solution and partner decisions;
- acceptance of material residual risk;
- final release authority where appropriate;
- management review and improvement priorities.

Give leaders decision-ready information. A gate pack may contain one page of recommendation, evidence, score, red risks, resources, assumptions and required decision. Do not ask the board to read the entire tender to decide whether the organisation can pursue it.

Equally, do not hide risk inside appendices and then blame leadership for optimism.

Roles need authority, not just responsibility - A RACI matrix can help, but it often lists participation without decision rights.

For each material role, define responsibility and authority.

Executive sponsor: secures leadership support, resolves strategic barriers and accepts defined high-level risks. Does not rewrite unilaterally after freeze.

Process owner: maintains and improves end-to-end bid management, monitors performance and resolves interface failures.

Bid or proposal manager: plans and controls the live response, maintains requirements, schedule, risks, actions and release readiness.

Capture lead: develops customer, competitive and win strategy before and during solicitation, with clear source discipline.

Solution lead: owns the deliverable operating model, assumptions, dependencies and design approval.

Commercial or pricing lead: owns cost, price, assumptions, approval and reconciliation with the solution and narrative.

Content owner or writer: develops responsive content from approved inputs and identifies gaps rather than inventing them.

Reviewer: assesses the output against defined criteria, records findings and avoids taking over authorship during independent review.

Production lead: controls formatting, file integrity, accessibility, naming, packaging and upload readiness.

Mobilisation or delivery owner: accepts commitments and confirms operational readiness.

One person may hold several roles. The roles still need distinction.

The authority matrix - West Quay created an authority matrix for decisions that had previously travelled through personality.

The bid director could decline Standard opportunities within agreed criteria. The executive sponsor approved Enhanced pursuits. The board approved Strategic pursuits and any exception below minimum margin. Legal accepted contract departures. Operations approved staffing and mobilisation. The commercial director approved price. The bid director released the final response only when all required approvals were recorded.

Emergency authority existed. It required a reason, impact assessment, named approver and post-bid review.

This did not prevent late change. It made late change visible.

Leadership must provide resources - A process cannot be effective when leadership approves ten simultaneous bids and funds capacity for four.

Resource decisions include people, time, budget, systems, data, workspace, training, external support and contingency. The bid plan should make constraints visible before the deadline converts them into defects.

At West Quay, subject-matter experts were allocated by percentage of theoretical availability. The numbers looked generous because nobody subtracted delivery commitments. The new capacity review used actual named hours during critical weeks. Two pursuits were delayed, one was partnered and one was declined.

The pipeline became smaller.

The submitted bids became real.

Culture is what happens after challenge - Leaders often say they welcome challenge. People watch what happens to the first person who provides it.

A quality culture allows a coordinator to stop release when a mandatory schedule is missing. It allows finance to challenge an unpriced enhancement. It allows delivery to say the mobilisation cannot work. It allows a writer to mark evidence as unverified even when the claim appears in last year's winning bid.

Safe challenge needs routes and protection. Use review roles, escalation rules, anonymous reporting where appropriate, pre-mortems and decision records. More importantly, leaders must respond without punishing the messenger through exclusion or sarcasm.

One West Quay coordinator raised that an executive biography contained a qualification the individual had not completed. The sentence was removed. The chief executive thanked her in the team review rather than privately.

People noticed.

Management attention should follow risk - Top management cannot attend every bid meeting. It should know where involvement is required.

Set triggers:

- pursuit exceeds a value or liability threshold;
- margin falls below the approved floor;
- novel service or technology is proposed;
- material customer requirement remains uncertain;
- delivery cannot confirm capacity;
- partner failure would prevent performance;
- legal departure remains unresolved;
- evidence is insufficient for a critical claim;
- submission depends on exceptional working hours;
- a control has been overridden.

The trigger should lead to a decision, not merely another copy of the risk register.

Leadership evidence is behaviour - An auditor may ask how top management demonstrates leadership and commitment. Do not answer only with policy signatures and meeting minutes.

Show decisions: resources approved, risks addressed, objectives reviewed, customer issues escalated, process performance discussed, corrective actions sponsored and conflicting priorities resolved.

Show that leadership understands the process. Can the sponsor explain the quality objectives? Can the board describe the effect of late change? Does management review result in action? Are quality and customer considerations present in commercial decisions?

The strongest evidence may be a no-bid decision that protected delivery and customer trust.

A monthly bid-quality review - Keep it short and decision-focused. Review:

- objective performance and trends;
- current high-risk pursuits;
- capacity and competence;
- late defects and recurring causes;
- overrides and exceptions;
- customer, evaluator and delivery feedback;
- external changes affecting the process;
- improvement actions needing leadership support.

This is not the formal management review by itself, though it can feed it. It is operational leadership.

West Quay's first meeting exposed that red-review defects had fallen while post-freeze changes had risen. The team had improved early control, then leadership was reopening work later. The chief executive did not enjoy the chart.

He changed his own behaviour before asking for another procedure.

That was leadership.

Opportunity Identification and the No-Bid Gate

CASE FILE

> Meridian Mobility discovered the opportunity at 07:36 on a Monday.
>
> By 07:51 the sales director had written 'must win' in the CRM. By 08:10 the managing director had sent the notice to twelve people. At 08:42 the bid manager found the requirement for a national depot network. Meridian had three depots, all in the north of England.
>
> At 09:05 somebody suggested calling subcontractors.
>
> Nobody had yet read the payment schedule, the insurance requirement or the mobilisation date.
>
> The opportunity was not being qualified. It was gathering emotional speed.

Opportunity identification is a controlled input - The end-to-end process begins before the formal bid. Leads may come from procurement portals, frameworks, account teams, market notices, customer conversations, renewal data, partners, consultants or automated alerts.

A mature system records the source and preserves the original information. It avoids duplicate opportunity records and distinguishes a possible requirement from a published competition.

The minimum capture record should answer:

- who may buy;
- what appears to be required;
- likely route to market;
- estimated timing and value;
- source and date;
- strategic owner;
- next irreversible action;
- current confidence and unknowns.

At this stage, precision has limits. Mark that honestly. 'Value unknown' is better than a framework ceiling copied into forecast revenue.

Triage before celebration - Triage is a short, severe check. It protects the organisation from spending a day on an opportunity it cannot enter.

Within the first working hour, or as soon as practicable, check:

- submission deadline and clarification deadline;

- jurisdiction and procedure;
- lot structure and geographical scope;
- mandatory participation conditions;
- required accreditations, licences, insurance and financial thresholds;
- conflict or exclusion concerns;
- contract term and mobilisation date;
- portal access and document completeness;
- obvious capability or capacity barriers;
- whether the opportunity is genuinely new or already logged.

Do not attempt a full gate in ten minutes. Find the conditions that can stop the pursuit before enthusiasm starts consuming resource.

Meridian's triage showed that the depot requirement could be met through a named network partner, but only if the partner accepted joint mobilisation and data obligations. The issue moved from 'fatal' to 'conditional'. That was enough to justify a proper gate. It was not enough to mark the opportunity green.

Qualification is a decision, not a score - Scoring models help structure judgement. They do not make the decision for leadership.

A practical model assesses separate dimensions:

Strategic fit. Does the work support chosen markets, capabilities and direction?

Customer and route. Is there a lawful, realistic route to compete? What is known about the need and decision process?

Requirement fit. Can mandatory and material requirements be met?

Solution and evidence. Can the organisation offer a credible, differentiated and evidenced solution?

Competition. What position is likely relative to incumbents and rivals?

Commercial case. Is the likely revenue, margin, cash profile and risk acceptable?

Capacity and timing. Can the bid be produced and the contract delivered without damaging other commitments?

Risk and ethics. Are legal, contractual, reputational, data, safety, supply-chain or integrity concerns acceptable and manageable?

Each dimension should have a minimum threshold as well as a score. A high total cannot safely average away a zero in mandatory compliance or deliverability.

Use evidence beside the score - The qualification record should show why a score was given.

'Customer relationship: 8/10' is weak evidence.

'Account director met the service lead twice during published market engagement; buyer confirmed current pain around national recovery coverage; no contact with evaluators during live procurement; source notes dated 12 and 19 May' gives the score bones.

'Win probability: 70 per cent' is not evidence either. Probability may be a useful forecast, but it should be connected to a defined method and calibrated against actual outcomes. Senior confidence is not calibration.

Meridian required one sentence of rationale and one source for every score above seven. The rule felt annoying until the first executive tried to award ten for 'relationship' and could not identify the relevant customer requirement.

The gate meeting - A gate meeting should be short enough to happen and serious enough to matter.

For a Standard opportunity, twenty to thirty minutes may be sufficient. Enhanced or Strategic opportunities need more preparation and authority.

Issue the pack before the meeting. Include:

- opportunity summary and source;
- requirements and obvious barriers;
- customer and competitive position;
- solution and evidence position;
- resource demand;
- commercial range and cash concerns;
- key risks, opportunities and unknowns;
- recommendation and conditions.

At the meeting, decide one of five outcomes:

1. bid;
2. bid subject to explicit conditions;
3. pursue through a partner or alternative role;
4. defer pending defined information;
5. no-bid.

Record the decision, authority, reasons, conditions, owners and re-gate trigger.

'Bid subject to partner capacity confirmed by Thursday 12:00' is a decision. 'Proceed cautiously' is a mood.

No-bid is a quality output - A well-reasoned no-bid protects resources, margin, delivery and customer trust. It is not a failure of sales.

Common reasons include:

- mandatory conditions cannot be met;
- the solution would depend on invention rather than capability;
- the organisation lacks time or competence to respond properly;
- delivery capacity is unavailable;
- commercial terms fall below approved boundaries;
- the customer route or competitive position is too weak;
- the work conflicts with strategy or ethics;

- the evidence gap cannot be closed honestly;
- another pursuit deserves the resource.

Record the reason in a taxonomy that can be analysed. 'Did not fit' teaches little. 'No-bid: mobilisation date precedes achievable security clearance by six weeks' can influence future market engagement and capability planning.

A no-bid decision should also identify any future action. Develop a partner. Obtain an accreditation. Improve an evidence gap. Monitor the next renewal. Sometimes the correct action is none.

The sunk-cost trap - Qualification is not a single gate. Material change can make an earlier decision obsolete.

Re-gate when:

- clarifications alter scope or evaluation;
- contract review identifies new liability;
- pricing falls below margin boundaries;
- a partner withdraws or changes terms;
- key evidence proves unavailable;
- delivery capacity changes;
- the customer timetable moves;
- a competitor or route assumption changes materially;
- leadership proposes a different solution.

Teams resist re-gating because effort has already been spent. That is precisely when sunk cost becomes dangerous.

Meridian had invested 430 hours when the preferred partner withdrew. The sales director argued that stopping would waste the hours. Finance asked whether another 600 hours and an undeliverable contract would restore them.

The pursuit was paused. A smaller regional lot remained viable and was requalified separately.

Override needs daylight - Leadership may override a gate. A management system should not pretend otherwise.

Define who can override, on what information and with what record. Capture:

- the original recommendation;
- reason for override;
- additional risk or opportunity accepted;
- conditions and resources;
- person authorising;
- review date;
- post-result evaluation.

Track override performance. If overridden no-bids regularly lose or damage delivery, the evidence belongs in management review. If the gate repeatedly rejects strategic opportunities that later succeed, the model may be too conservative.

An override is not automatically wrong. Invisible override is.

Bid capacity is part of qualification - A company can be capable of delivering the contract and incapable of producing the bid at that moment.

Estimate effort by role and critical period. Consider concurrent bids, holidays, delivery peaks, financial close, partner availability and review capacity. Avoid using total monthly hours when the real collision occurs in the final three days.

A simple capacity view lists each critical role, available hours, committed hours, proposed bid demand and contingency. The number is imperfect. It is still better than asking whether everyone is 'comfortable'.

Meridian's technical lead appeared to have forty free hours over the month. Thirty-six were after the solution freeze. The process did not need forty hours eventually. It needed twelve by Wednesday.

The opportunity class moved from Standard to Enhanced and external support was approved.

Commercial qualification before detailed price - Early commercial modelling uses ranges and assumptions. It should still expose the shape of the deal.

Consider:

- realistic volume rather than advertised maximum;
- contract and extension period;
- payment mechanism and lag;
- mobilisation cost;
- inflation and indexation;
- labour, materials and partner exposure;
- performance deductions and liabilities;
- bid and implementation cost;
- minimum sustainable margin;
- working capital and cash trough;
- opportunity cost of displaced work.

Do not demand false precision. Document what must be resolved before later gates.

A framework ceiling of £60 million may produce £0 for a supplier. A £250,000 pilot may create a strategic reference and stable margin. Value is contextual.

Opportunity risk and QMS risk connect - Qualification findings should feed wider organisational risk and opportunity where relevant.

If repeated opportunities require an accreditation the organisation lacks, that may become a strategic improvement decision. If customers increasingly expect carbon data, the evidence system may need investment. If multiple bids fail because contract terms transfer unacceptable liability, leadership may need a market-position decision rather than another late legal review.

The QMS should learn from the pipeline before failure reaches delivery.

Internal audit trail - An auditor following qualification may ask:

- how are opportunities identified and recorded;
- what prevents duplicate or stale records;
- what criteria are used;
- who has authority to decide;
- how are customer and statutory requirements considered;
- how do risk and opportunity influence depth of control;
- how is capacity assessed;
- how are conditional decisions monitored;
- when is requalification required;
- what happens after no-bid or override;
- how does performance improve the model.

The answer should be visible in live records, not only in a gate procedure.

A qualification drill for Friday - Take the three most attractive opportunities in the pipeline. Remove headline value from the screen.

For each one, write:

- the strongest source-backed reason to pursue;
- the most dangerous unknown;
- the minimum condition that must be met;
- the scarce resource it will consume;
- the event that would trigger no-bid;
- the next gate date.

Then ask delivery and finance to challenge the answers.

Meridian did this at 15:30 on a Friday. One opportunity became stronger. One became conditional. One left the pipeline entirely.

Nobody enjoyed deleting the largest number.

On Monday, the team had capacity to bid the work it could actually win and deliver.

CHAPTER 8

Capture Planning, Customer Insight and Win Strategy

CASE FILE

> BoroughLink Technology had a capture plan with thirty-two pages and no customer problem.

> It contained an organisation chart, a competitor table, a schedule of meetings, a list of possible win themes and several photographs of people looking at screens. The customer section said the authority wanted 'innovation, value and partnership'. Those words had appeared in almost every tender the company had pursued.
>
> A new capture lead, Sana, asked one question.
>
> 'What becomes difficult for the buyer at 08:00 on the first Monday of the contract?'

> The room could not answer.

Capture turns access into understanding - Capture is the controlled work of improving the organisation's position before and during a competition. It includes customer and market understanding, strategy, competitive positioning, solution shaping, partner decisions, evidence planning and leadership alignment.

It does not mean privately influencing an evaluator or obtaining information other bidders should not have. Public procurement boundaries remain real. Use published engagement, lawful professional contact, market data, prior delivery knowledge, public records and properly managed customer conversations.

The objective is not intimacy. It is relevant understanding.

Build a source hierarchy - Customer insight varies in reliability. Treat sources differently.

Authoritative: published notice, tender document, clarification, contract, policy, official plan or direct formal response.

Strong: documented customer engagement, current service data, performance report, committee paper, annual report or verified account record.

Indicative: stakeholder opinion, partner experience, public commentary or historic procurement pattern.

Speculative: rumour, assumed budget, unverified incumbent story, 'they like us' or a colleague's memory of a conversation.

Do not ban inference. Label it.

BoroughLink's capture plan added source, date, confidence and impact to every material insight. The plan became shorter because unsupported repetition disappeared.

Customer requirements are more than preferences - Separate four ideas:

- **stated requirement:** what the customer has formally asked for;
- **underlying need:** the operational or public outcome behind it;
- **evaluation evidence:** what the buyer can score or use to establish confidence;
- **supplier hypothesis:** how the organisation believes it can respond better than competitors.

A buyer may state a requirement for a 30-minute response time. The underlying need may be continuity of a critical service. The evaluation may ask for method, resource, escalation and past performance. The supplier hypothesis may be a regional on-call model with measured recovery evidence.

Keep the chain visible. Otherwise 'customer insight' becomes an excuse to ignore the question.

The capture canvas - A useful capture plan can be organised around ten fields:

1. customer mission, outcomes and current situation;
2. stakeholders and their relevant responsibilities;
3. procurement route, timetable and decision constraints;
4. known, inferred and unknown requirements;
5. incumbent and competitive positions;
6. supplier strengths, gaps and proof;
7. candidate solution and commercial boundaries;
8. partners, dependencies and access;
9. win strategy, themes and actions;
10. risks, decisions, owners and next gate.

Depth follows opportunity class. A strategic pursuit may require substantial research and scenario testing. A short call-off may use two pages.

The plan should change decisions. If it only stores information, it is a report.

Stakeholder maps need professional restraint - Map roles that affect need, budget, procurement, evaluation, assurance, use and delivery. Use public professional information and lawful engagement. Do not collect private details because a sales tool permits it.

For each relevant role, ask:

- what outcome or risk are they responsible for;
- what evidence would reduce reasonable doubt;
- what published requirement or decision connects to them;
- how can the organisation engage fairly;
- what must not be assumed.

Sana mapped procurement, digital service, information governance, finance, accessibility, operations, user representatives and executive sponsorship. The map did not claim that every person would evaluate. It helped the team design a solution that could survive the interests represented in the documents.

Competitive intelligence without theatre - Competitor analysis should explain likely choices, not produce cartoons.

Use lawful sources: published awards, accounts, case studies, recruitment, service locations, technology partnerships, contract performance where public, customer feedback, pricing structures and your own direct competitive experience.

For each serious competitor, consider:

- likely customer position;
- relevant strengths and evidence;
- probable solution or commercial approach;
- weaknesses or constraints that can be addressed ethically;
- how the competitor may describe your organisation;
- what the buyer might see as safer in their offer.

A black-hat review can be useful when a team adopts the competitor's perspective and builds a credible rival strategy. It becomes useless when reviewers merely say, 'They will be cheaper.'

BoroughLink's black-hat team concluded that the incumbent would sell continuity, existing integrations and low transition risk. BoroughLink had planned to sell innovation. The strategy changed. It now had to prove controlled transition before innovation could matter.

Win themes are arguments, not slogans - A win theme is an important, distinctive, defensible and deliverable reason the buyer can safely prefer the offer under the evaluation.

Use a five-part test:

Importance: does it address a material customer outcome, criterion or risk?

Difference: is it meaningfully different from credible competitors?

Proof: can the claim be supported with current, relevant evidence?

Delivery: can the organisation resource and price it?

Traceability: where will the evaluator see and score it?

'Local, innovative and customer-focused' fails the test.

'Named regional transition leads already cleared for the relevant environment, supported by a rehearsed 30-day data-migration plan and evidence from three comparable transfers' is closer. It may still need opportunity-specific proof and permission.

Avoid too many themes. Three strong themes can shape a bid. Twelve become wallpaper.

Strategy is a set of choices - A capture strategy should state what the organisation will do and what it will not do.

It may choose to compete on transition certainty rather than feature volume. It may choose a partner to close a regional gap. It may decline an unprofitable lot. It may offer a standard core with priced options rather than burying enhancements. It may expose one honest limitation and control rather than claiming perfection.

Choices create coherence. Generic aspiration creates a longer document.

At BoroughLink, the final strategy had four decisions:

- neutralise incumbent advantage through a low-risk transition design;
- lead with service continuity and user adoption;
- use a specialist accessibility partner with named outputs;
- refuse custom development outside the priced roadmap.

The last decision was commercially difficult. It also stopped the sales director promising an undefined platform feature in every workshop.

Capture actions need owners and dates - A capture plan without action is commentary.

Actions may include:

- obtain an authoritative answer through market engagement;
- validate a service volume;
- secure reference permission;
- test a prototype;
- recruit or reserve a key role;
- negotiate partner terms;
- develop missing evidence;
- model transition risk;
- review the contract route;
- decide lot strategy;
- brief leadership before the solicitation.

Record owner, due date, expected output and effect on the gate or strategy.

'Improve relationship' cannot be closed. 'Attend published supplier briefing on 14 June and confirm whether legacy data must be migrated before go-live' can.

Capture and design control meet early - If the organisation begins shaping a customer-specific solution during capture, design controls may already be relevant. Identify inputs, assumptions, interfaces, constraints and review points.

Do not allow a pre-tender concept to become an unchallenged commitment. Mark maturity. A hypothesis is not an approved design output.

BoroughLink used three labels:

- **concept:** possible approach requiring validation;
- **baseline:** agreed basis for response planning;
- **approved offer:** designed, costed, reviewed and authorised.

The labels prevented a diagram from a February workshop reappearing in the final tender as though operations had approved it.

Ethical customer communication - Define communication routes before the live procurement.

During pre-market engagement, provide useful, accurate information and keep records. During a live procurement, follow the formal communication channel unless the documents expressly permit another route. Do not use account relationships to bypass clarification rules. Do not ask a friendly stakeholder to interpret an ambiguous requirement privately.

The capture record should show what information was received, under what circumstances, whether it is shareable and how it was used.

A rumour about budget should not enter the pricing model as fact. A formal clarification response should change every affected output.

Capture review gates - Run reviews for decisions, not ceremony.

Early position review: Is the customer need understood enough to justify continued investment?

Strategy review: Are the proposed win strategy, competitive position, solution direction and partners credible?

Pre-solicitation readiness review: Are resources, evidence, actions and decision authority ready for the expected competition?

Post-solicitation strategy reset: What changed when the actual documents arrived?

The last review is frequently missed. Teams fall in love with the capture story and force the solicitation to fit it.

When BoroughLink received the tender, price weight was lower than expected but mobilisation evidence carried more marks. The capture strategy became stronger. Another assumption - that custom reporting would be central - disappeared entirely.

A good capture plan bends when the customer speaks formally.

Capture measures - Do not measure capture only by win rate. Useful indicators include:

- percentage of strategic pursuits with source-backed customer issues;
- capture actions completed before solicitation;
- evidence gaps closed;
- partner commitments secured;
- material assumptions confirmed or retired;
- strategy changes after document release;
- late discovery of mandatory requirements;
- win themes retained through final submission;
- review forecast versus evaluator feedback;
- cost of capture relative to qualified opportunity value.

A high number of strategy changes after release may indicate weak capture. It may also indicate disciplined response to new information. Analyse the reasons.

A realistic capture scenario - Sana's team had six weeks before the expected notice.
Week one: confirm customer outcomes, route, likely timetable and current service position from public sources and approved account notes.
Week two: map roles, incumbent position, internal capability and evidence.
Week three: hold a solution workshop focused on the buyer's operating risks, not product features.
Week four: test transition, pricing range, partner scope and resource availability.
Week five: run a competitor review and leadership strategy gate.
Week six: close critical evidence gaps, prepare the solicitation workspace and agree the first 48-hour response plan.
The notice arrived ten days late. The team did not fill the delay with more slides. It checked whether sources, risks or capacity had changed.

The capture audit - Ask a reviewer who was not involved to choose one major insight and trace it.
Where did it come from? When was it obtained? Is it fact, inference or unknown? Which decision did it change? Which requirement or risk does it affect? Where is it reflected in the solution, price or evidence? Has later information contradicted it?
If the chain breaks, fix the strategy before polishing the prose.
BoroughLink's original plan said the buyer feared innovation risk. Nobody could source the statement. The team removed it.
What remained was less dramatic: the authority needed continuity, accessible service and a transition it could defend.
That was enough to build a serious bid.

CHAPTER 9

Tender Intake, Requirements and Compliance

CASE FILE

At 10:07 on a Thursday, Eastmere Print & Mail downloaded the tender pack.

There were forty-one files. The portal displayed thirty-nine. Two sat inside a compressed folder attached to a clarification notice from the previous afternoon. The business-development manager saved some files to SharePoint, some to his desktop and one pricing schedule to an email draft because he intended to 'come back to it'.

At 11:20 the bid manager asked for the authoritative pack.

Three people sent three links.

The competition had been open for seventy-three minutes and document control was already fictional.

Receipt is a controlled event - Treat receipt of a solicitation as a formal process input. Capture the notice, documents, portal messages, timetable, customer contact route and source metadata before people begin editing copies.

The intake record should contain:

- opportunity identifier and lot;
- contracting authority or customer;
- portal and authorised accounts;
- issue date, clarification deadline and submission deadline;
- document list and version or issue status;
- amendments and notices;
- responsible bid manager;
- storage location for originals;
- access and confidentiality classification;
- checksum or other integrity control where proportionate;
- initial triage and next gate.

Preserve native files. Do not convert everything to PDF and throw away the spreadsheets, hidden instructions or document properties that matter.

Eastmere created a read-only `00_Source` folder. Working copies lived elsewhere. Portal downloads were logged with date and downloader. When Clarification 6 replaced the pricing schedule, the old file remained controlled but visibly superseded.

Nobody needed to remember which one was current.

Establish the document baseline - A baseline is the set of documents and instructions against which the team is working at a stated time.

Name it. Date it. Record later changes.

For a complex procurement, the baseline may include the notice, invitation, instructions, evaluation methodology, response templates, specification, pricing schedule, contract, appendices, data, policies, clarification responses and portal guidance.

Do not rely on the tender pack's folder structure. Customers organise documents for their own process, not your internal control.

A baseline does not freeze the competition. It gives change somewhere to start.

Requirements are scattered - The obvious question is rarely the whole requirement.

Instructions may sit in the invitation, portal, response template, specification, contract, pricing notes and clarifications. A word limit may be defined in one place and qualified in another. A mandatory attachment may be mentioned only in the submission checklist. A service level may appear in a schedule rather than the question asking how it will be achieved.

Requirements include:

- submission instructions;
- participation and exclusion conditions;
- technical and professional requirements;
- service or product specifications;
- evaluation criteria and scoring guidance;
- contractual obligations;
- legal, regulatory and policy requirements;
- pricing rules and assumptions;
- format, word, page, file and portal constraints;
- declarations, signatures and certificates;
- deadlines and communication rules;
- post-award and mobilisation obligations.

The compliance matrix should make these traceable.

Build an atomic compliance matrix - 'Provide mobilisation plan' is too broad if the requirement contains twelve components.

Break requirements into units that can be owned, answered and checked. Each entry should contain, as needed:

- unique identifier;
- exact source and location;
- concise requirement statement;
- requirement type;
- mandatory or scored status;
- question or response location;
- owner;

- due date;
- evidence or attachment;
- dependency;
- status;
- verification and verifier;
- change history.

Do not copy the entire specification into a spreadsheet without judgement. The matrix should control the response, not become another document nobody can navigate.

Eastmere used prefixes: INS for instruction, PAR for participation, TEC for technical, COM for commercial, CON for contract and CLA for clarification. When a requirement changed, affected entries could be found quickly.

Compliance and responsiveness are different - Compliance earns the right to be considered. Responsiveness helps the evaluator understand how the offer meets the requirement and creates value.

A response can be compliant but weak. It includes every requested component yet provides little confidence, evidence or distinction. It can also be persuasive but non-compliant, answering a broader problem while omitting a mandatory instruction.

Control both.

For each scored question, create an answer plan that maps:

- instruction verbs;
- required topics and subtopics;
- evaluation criteria;
- customer outcomes and risks;
- proposed method;
- evidence;
- measures;
- differentiators;
- word allocation;
- owner and reviewers.

The compliance matrix proves coverage. The answer plan shapes the argument. Combining them may work for simple bids, but do not let strategic content hide mandatory items.

Review the requirements before promising - ISO 9001 expects requirements for products and services to be determined and reviewed before commitment. In bidding, this means more than reading the specification.

The review should confirm that:

- requirements are defined and understood;
- differences between earlier discussions and formal documents are resolved;
- the organisation can meet the requirements;
- assumptions and exceptions are identified;

- legal and contractual matters are reviewed by competent people;
- resources and capacity are credible;
- customer communication routes are known;
- records of the review and resulting actions are retained.

The review can occur in stages. Initial contract review may identify red clauses. Detailed review may follow solution and price development. Final review confirms the offer and departures before release.

Do not wait until Gold review to discover that the customer requires unlimited liability.

Contract review is not a legal footnote - Commercial and legal terms can reshape the solution and price.

Review:

- term, extensions and termination;
- liabilities, indemnities and insurance;
- warranties and guarantees;
- service credits and performance deductions;
- intellectual property;
- data protection and security;
- audit and transparency rights;
- payment, retention and indexation;
- change control;
- TUPE or workforce transfer where relevant;
- subcontracting and assignment;
- exit and transition;
- dispute and governing law;
- social-value and reporting commitments;
- confidentiality and publication.

Record departures through the permitted route. A private note saying 'legal dislikes this' does not protect the organisation after award.

Eastmere found that the authority could require emergency print production within six hours. The service design had assumed next-day response. The contract point moved into solution, resource and pricing. Legal review had altered operations, not merely wording.

Clarification questions are controlled customer communication - A good clarification question identifies the source, ambiguity, material effect and precise information required. It does not deliver a speech.

Use this structure:

> *> Reference: Schedule 3, paragraph 4.2 and Pricing Schedule row 18.*
>
> *>*
>
> *> The specification states that emergency fulfilment may be required within six hours, while the pricing schedule provides rates only for next-day and three-day*

> *service. Please confirm whether bidders should include a separate six-hour emergency rate and, if so, where it should be entered.*

Short. Traceable. Answerable.

Log questions, submission date, customer response, interpretation, owner and affected outputs. When an answer arrives, assess the effect on compliance, solution, price, contract, evidence, schedule and other bidders' information where published.

Never update only the document that first raised the question.

The clarification impact meeting - For material answers, hold a ten-minute impact check with the right owners.

1. What changed?
2. Which requirement entries are affected?
3. Does the gate decision change?
4. Which solution, price, evidence, partner or contract outputs must be updated?
5. Who owns each update?
6. What needs reapproval?
7. Does the timetable move?

Eastmere received a clarification at 16:44 on the day before content freeze. The authority removed one reporting requirement and added a data-retention obligation. The team did not reopen the whole bid. It updated five matrix entries, the data solution, contract review, price assumption and two answers.

Change was controlled without becoming dramatic.

Plan the response from requirements - The bid plan should reflect the actual solicitation rather than a standard calendar pasted into a new file.

Set:

- internal deadlines with contingency;
- decision gates;
- solution and pricing milestones;
- evidence deadlines;
- answer planning and drafting sequence;
- review purposes and maturity criteria;
- production and accessibility checks;
- approval and release route;
- upload rehearsal;
- escalation and change control;
- communication rhythm.

Critical questions and schedules may need earlier development. Partner inputs may need contractual lead time. Pricing may need volume assumptions resolved before narrative claims can be finalised.

A plan that treats every answer as equal will spend too much time on low-value work and discover high-risk gaps late.

Responsibilities at question level - Assign one accountable content owner for each response, even when several specialists contribute. The owner ensures coverage, integration, evidence and closure.

Contributors should know what they are being asked to provide. 'Please send content for question 4' invites a brochure. Ask for decisions, examples, measures, risks, controls and evidence against a structured brief.

Reviewers should be named before drafting. A security response reviewed by marketing because the security lead is busy has not been independently checked by a competent person.

Eastmere's answer plan listed owner, contributors, evidence lead, commercial reviewer and final approver. Some names repeated. The distinctions still helped.

Word and page limits are requirements - Establish the counting rule. Does the limit include tables, captions, diagrams, headers, footnotes or embedded text? What happens to words in uploaded appendices? Does the portal count characters differently from Word?

Allocate space by score, complexity and evidence need. Do not give every subcriterion the same number of words.

A useful allocation starts with the direct answer and method. Evidence, measure, risk and benefit need space. Corporate history receives what remains, which is often nothing.

Production tricks are not control. Tiny fonts, images of text and squeezed tables may breach instructions or destroy accessibility. If the answer does not fit, prioritise.

The kill sheet - Create a separate short list of conditions capable of excluding, rejecting or materially damaging the submission before quality can rescue it.

Include:

- deadline and time zone;
- portal and account access;
- lot and submission route;
- mandatory thresholds;
- declarations and signatures;
- required attachments;
- file formats, sizes and naming;
- word or page limits;
- pricing completion rules;
- prohibited departures;
- required certificates;
- submission confirmation.

Assign independent verification. The kill sheet should be visible throughout the bid, not produced on submission morning.

At Eastmere, the list contained twenty-two items. The managing director called it pessimistic. Two weeks later it prevented an unsigned parent-company declaration from reaching the portal.

He kept the name.

Nonconforming inputs - Sometimes customer information is incomplete, contradictory or technically unusable. Record the issue and use the clarification route. Do not silently choose the interpretation most favourable to the solution.

Sometimes internal inputs are nonconforming: expired certificate, unapproved case study, unresolved turnover figure, partner letter missing authority, pricing model without source data.

Quarantine or label them. A red status should prevent release into the final answer unless risk is formally accepted and the claim remains accurate.

The evidence library is not trustworthy merely because it is centralised.

Audit the intake process - Follow one requirement from the customer's source through decomposition, ownership, answer, evidence, review and final submission.

Ask:

- was the original source preserved;
- did later clarifications change it;
- is the interpretation recorded;
- does the response location match the matrix;
- was the answer reviewed against the requirement;
- does the final file contain the approved response;
- did handover capture any resulting commitment.

One broken link may expose a local error. Repeated breaks indicate process failure.

The first forty-eight hours - Hour 0-2: preserve and log the source pack, confirm portal access, deadlines and document completeness.

Hour 2-6: conduct triage, identify fatal conditions, establish the baseline and issue immediate clarification needs.

Hour 6-12: complete initial qualification update, assign document owners, begin compliance and contract review.

Day 2 morning: hold kick-off with customer outcomes, strategy, requirements, roles, schedule, risks and working rules.

Day 2 afternoon: baseline the compliance matrix, answer plan, solution workstreams, pricing route, evidence requests and review timetable.

Do not spend the first day designing a cover page.

Eastmere submitted on Tuesday at 10:18, nearly a full day before the deadline. The portal receipt matched the release list. Every clarification had an impact record. Two minor review findings remained open and were formally accepted because neither affected compliance or promise.

The bid was not perfect.

It was controlled enough to know where it was not.

CHAPTER 10

Solution Design, Pricing and Evidence

CASE FILE

> Solent Response Services had answered the question beautifully.

> The proposed control room would operate twenty-four hours a day. Incidents would be triaged within five minutes. Regional teams would deploy within thirty. The dashboard would provide live customer visibility. Monthly reviews would drive continual improvement.
>
> At solution review, the operations director asked where the night shift came from.
>
> The bid manager pointed to the paragraph.
>
> The operations director pointed to the rota.

> There was no night shift.

A bid designs an offer - Where an organisation creates or adapts a customer-specific solution, the work should be treated as design and development. The label may sound technical. The principle is ordinary: define what the design must achieve, review it at suitable stages, verify that outputs meet inputs, validate that the resulting service can meet its intended use and control changes.

The designed output may include:

- operating model;
- service levels;
- roles and staffing;
- technology and data flows;
- mobilisation and transition;
- governance and reporting;
- supply chain;
- continuity and recovery;
- social value;
- price and commercial model;
- measures and improvement;
- assumptions and exclusions.

Writing describes the design. It should not invent it.

Start with design inputs - Design inputs come from customer requirements, laws, standards, contracts, user needs, organisational knowledge, previous experience, risks, commercial boundaries and partner constraints.

Control their quality. Inputs should be adequate, complete enough, unambiguous where possible and reconciled when they conflict.

For Solent's control-room solution, inputs included required response times, incident volumes, coverage geography, security classifications, existing systems, staffing law, customer reporting, mobilisation date, price weight and contract liabilities.

The team also held assumptions: night-time incident volume, access to customer data, availability of regional subcontractors and the proportion of incidents requiring physical deployment.

Assumptions were not buried in the design. They were numbered, owned and either confirmed, modelled or exposed.

Design criteria before ideas - A solution workshop can produce energy without a usable output. Define the questions the design must answer.

- How does the service meet every material requirement?
- What people, assets, systems and partners are needed?
- What happens during ordinary demand and stressed demand?
- Which dependencies sit with the customer?
- How will performance be measured?
- What could fail, how will it be detected and how will service recover?
- What does the solution cost in base and stress cases?
- Which elements differentiate the offer and why are they credible?
- What must be mobilised before contract start?
- Which claims require evidence?

The criteria discipline creativity. They do not prevent it.

Design the difficult day - Brochure solutions work on average days. Buyers worry about the difficult one.

Walk realistic scenarios:

- demand doubles unexpectedly;
- one key person is absent;
- a partner misses its mobilisation milestone;
- customer data arrives late;
- a critical system fails;
- weather prevents travel;
- an incident crosses regional boundaries;
- a safeguarding or security issue escalates;
- a service level is missed;
- the buyer requests a change during mobilisation.

For each scenario, identify trigger, detection, decision authority, communication, containment, recovery, record and learning.

Solent's thirty-minute deployment promise failed when two simultaneous incidents occurred outside its existing regions. The team did not hide the result. It added an on-call network partner, revised dispatch rules, priced standby coverage and created a customer-approved prioritisation route.

The promise became narrower and stronger.

Review, verify and validate are not the same - A design review evaluates progress, adequacy, risk and decisions at planned stages. It may include customer insight, operations, finance, legal, security, partners and bid leadership.

Verification asks whether the design output meets the design inputs. Does the staffing model cover required hours? Does the mobilisation plan include every contractual milestone? Does the reporting design produce the specified data?

Validation asks whether the resulting service is capable of meeting intended use in realistic conditions. Can the call-handling process work at expected volume? Can users understand the interface? Can the mobilisation sequence achieve the date? Can the regional network respond when tested?

Validation may use simulations, pilots, prototypes, walkthroughs, capacity models, reference performance, demonstrations or rehearsals. The method follows risk.

A document review alone may not validate an operating model.

Design outputs must be usable downstream - A strong solution is not complete until writers, finance, partners and delivery can use its outputs.

Produce a controlled solution baseline containing:

- solution narrative or process map;
- resources and role assumptions;
- service levels and measures;
- mobilisation plan;
- technology and data requirements;
- partner work packages;
- risks, controls and contingency;
- customer dependencies;
- commercial assumptions;
- evidence references;
- approved differentiators;
- unresolved decisions.

Writers should not search meeting notes to discover the service. Finance should not cost a different staffing model. Partners should not learn their obligations from the final draft.

Pricing is part of design - Price is not applied after the solution. It is one of its constraints and outputs.

Build cost from the operating model. Connect each material resource, enhancement, risk allowance and partner cost to the solution. Reconcile quantities, volumes, timings and assumptions.

The commercial model should show:

- cost basis and sources;
- pricing mechanism;
- volume assumptions;
- labour and non-labour resources;
- mobilisation and transition;
- partner and supply-chain costs;
- inflation and indexation;
- risk and contingency;
- overhead and margin;
- cash profile;
- sensitivity and stress;
- approvals and departures.

Do not allow a narrative saving to exist outside the model. If the bid promises automation will remove 1,200 hours, finance should know where those hours sit and whether the saving is measured, modelled or aspirational.

The price narrative must tell the same truth - Evaluation models differ. Some score a total. Some use baskets, scenarios, rates, cost models or whole-life value. Rebuild the formula and test sensitivity.

Then ensure narrative and price agree.

If the answer promises a dedicated contract manager, the role should appear in cost. If rates assume remote delivery, the mobilisation plan should not promise daily on-site presence. If a social-value commitment needs funded apprenticeships, the cost and resource route must exist.

Solent's first model included a dashboard licence but no data analyst. The narrative promised monthly insight reports. The discrepancy was found at commercial reconciliation, not after award.

Use a value ledger - A value ledger connects cost to customer consequence.

For each material feature or enhancement, record:

- requirement or risk addressed;
- mechanism;
- customer benefit;
- measure;
- evidence;
- cost;
- commercial treatment;
- decision to retain, redesign or remove.

This helps when price pressure arrives. Cut unscored ornament before the control that protects a critical outcome.

At one review, a director proposed removing mobilisation rehearsal to save £18,000. The ledger showed that rehearsal supported the highest-scored transition criterion, reduced a known integration risk and produced acceptance evidence. The team found larger savings in duplicated reporting instead.

Evidence is a design input and output - Do not design a proposition that depends on proof you do not have.

An evidence card should contain:

- claim supported;
- source and owner;
- context and comparability;
- measure, baseline, period and population;
- result;
- permission and confidentiality;
- limitations;
- review or expiry date;
- approved wording where appropriate;
- opportunities for which it is relevant.

Evidence may include performance data, audited records, customer references, certificates, test results, case studies, qualifications, process records, delivery demonstrations and independent assurance.

Rank evidence. Recent, comparable, quantified and independent evidence usually carries more weight than an old testimonial. A modest case in the same operating environment may transfer better than a famous client in a different one.

Case studies need a transfer argument - Use a structure:

Context: what was being delivered, at what scale and under what conditions?

Challenge: what material problem or risk existed?

Action: what did the organisation actually do?

Control: how was performance governed and failure handled?

Result: what changed, measured over what period and population?

Learning: what was improved?

Transfer: why does the evidence predict performance for this requirement, including differences?

Solent's strongest case study involved a smaller region than the new contract. Instead of hiding the difference, the team explained how the same dispatch logic had been stress-tested at twice the historic peak and what additional regional capacity would be added.

Honest transfer increased credibility.

Design changes need impact control - Solutions change because requirements, price, partners, evidence or leadership decisions change. Record material changes and assess effects.

A change record should identify:

- reason and source;
- affected requirements and outputs;
- impact on performance, risk, price, evidence, contract and mobilisation;
- review and approval required;
- documents and people to update;
- status and closure.

Do not let an executive rewrite create a design change without review.

At 19:30 two days before submission, Solent's commercial director suggested increasing the guaranteed response from 95 to 98 per cent. The sentence looked small. The impact assessment showed extra standby capacity, partner terms and service-credit exposure. Leadership retained 95 per cent and offered a measured improvement target instead.

The change log had prevented an adjective from becoming a liability.

External partners are part of the design - Where subcontractors, consortium members or suppliers deliver part of the offer, define their inputs, outputs, interfaces, controls, resources, evidence and obligations.

Obtain commitment before relying on capability. Review financial, legal, quality, security, capacity and exclusion risks proportionately. Agree pricing, data, intellectual property, change, escalation and handover.

A logo is not a controlled external process.

Partners should review joint content. Their delivery model, rates and evidence must match the prime's submission. If the buyer calls a reference or partner, the answers should belong to the same system.

Social value and sustainability are designed services - Treat social-value and environmental commitments as operational outputs. Define beneficiary, baseline, action, owner, resources, timing, measure, reporting and remedy.

Do not offer ten apprentices because a previous tender asked for ten. Do not promise carbon reduction without a baseline or influence over the source. Align commitments with the contract, customer model and actual capability.

A commitment that wins points and fails in delivery is a quality nonconformity with a marketing origin.

Design review agenda - A solution review should answer:

1. Are all material inputs identified and controlled?
2. Does the proposed service meet requirements?
3. What remains assumed or unresolved?
4. Can resources and partners deliver it?
5. Does it work under stress?
6. Are service levels measurable and priced?
7. Are legal, data, safety and security obligations addressed?

8. What evidence supports the main claims?
9. What is genuinely distinctive?
10. Which customer dependencies need communication?
11. What needs validation before release?
12. Who approves the baseline?

Record decisions, not a transcript.

Verification drill - Choose one major promise from a live bid. Trace it through:

- customer requirement;
- design input;
- solution mechanism;
- resource model;
- price;
- evidence;
- narrative;
- risk and recovery;
- approval;
- handover.

If any link contradicts another, the promise is not ready.

Solent traced 'thirty-minute regional deployment'. It found the partner agreement said forty-five minutes, the price assumed thirty minutes only during daytime and the draft omitted the customer dependency for site access.

The team corrected the system before correcting the paragraph.

Release the design before releasing the prose - There must be a point at which the solution and commercial baseline are authorised for final response development. Changes can still occur, but they enter controlled change rather than casual editing.

The baseline should be mature enough that writers are explaining decisions, not creating them. It should be clear enough that delivery can recognise the service. It should be costed enough that every promise has a commercial home.

Solent's final answer remained strong. The control room operated twenty-four hours because the rota now contained a night shift. Regional response was supported by a signed network. Dashboard reporting had an analyst and a licence. The thirty-minute promise had defined conditions and recovery.

The prose had changed less than the operation.

That was the point.

CHAPTER 11

Writing as Controlled Production

CASE FILE

> Redfern Housing Services had seven writers and eleven versions of the same answer.
>
> One version was technically strong. One contained the approved case study. One matched the latest pricing model. Two were written against an earlier question. The version in the review folder combined none of those qualities.
>
> At 14:25 the proposal manager asked which file was authoritative.
>
> The reply arrived from three directions.
>
> 'Use mine.'

Writing begins after the answer has a job - A bid answer is not a blank page. It is an operational output created from requirements, strategy, solution, evidence and commercial decisions.

Before drafting, define the answer's job:

- which question components must be covered;
- what evaluator conclusion is sought;
- what method or solution will be explained;
- which evidence supports it;
- what customer consequence matters;
- what risks and controls must be visible;
- how much space is available;
- which claims or commitments are prohibited until approved.

An answer plan can be a short table, structured brief or annotated outline. Its purpose is to prevent the writer discovering the solution through prose.

Redfern required answer plans for all questions worth more than five per cent of quality score. Lower-value answers used a simpler checklist. The distinction saved time without removing control.

The content brief - Subject-matter experts usually do not need to write the final answer. They need to supply decisions and evidence.

A useful brief asks:

- what do we do;
- who does it;
- when and where;
- what information or resources are used;
- what can go wrong;
- how is it detected and controlled;

- how is performance measured;
- what evidence proves the method;
- what is different for this customer;
- which assumptions remain.

Avoid 'Please provide 500 words on mobilisation'. It invites generic description, copied policy and a late argument about meaning.

Interviewing may work better. Record with permission, capture decisions, send a concise factual note for approval and then draft. The expert remains accountable for technical content without being forced to become a proposal writer at midnight.

Controlled sources - Writers should know which sources are approved and current.

Use an evidence and content library with:

- owner;
- source;
- approval status;
- review date;
- relevant sectors or services;
- confidentiality and permission;
- limitations;
- linked operational record;
- superseded versions.

Do not let 'previously submitted' mean 'true'. A winning bid may contain an obsolete figure. A policy may have changed. A case study may no longer have customer permission.

Redfern's library showed that a 97 per cent first-time-fix figure came from one three-month pilot. The draft described it as company-wide performance. The writer did not invent the number; the system had failed to preserve its limits.

The evidence card was corrected. So was the answer.

One owner, controlled contributors - Each answer needs one accountable owner. Several writers can contribute, but authority over the working version must be clear.

The owner:

- understands the requirement and plan;
- coordinates inputs;
- maintains traceability;
- flags gaps and assumptions;
- reconciles comments;
- obtains technical approval;
- delivers the agreed maturity by the milestone.

A collaboration platform does not resolve ownership by itself. Ten people can edit the wrong paragraph simultaneously.

Set permissions and status. Drafting, technical review, independent review, correction and approved states should be distinguishable. Restrict final production files from casual editing.

Define draft maturity - 'First draft' means different things to different people. Define it.

For Redfern:

Outline ready: all question components mapped; main proposition and evidence identified; gaps named.

First draft ready: complete response in every section; approved solution used; evidence referenced; assumptions visible; no hidden placeholders; word count within 15 per cent.

Review draft ready: technical approval obtained; price and commitments reconciled; visuals legible; all material gaps resolved or escalated.

Final content ready: review findings closed; facts verified; commitments approved; text within limits; production may begin.

The definitions reduced arguments about percentages. A document could be 90 per cent full and not review-ready.

Responsive structure - A tired evaluator should not excavate the answer.

Lead with the direct response. Then explain mechanism, ownership, timing, control, evidence, measure and customer consequence in the order that best fits the question.

Not every paragraph needs the same formula. Predictable writing becomes flat and can obscure judgement. Vary pace while keeping logic visible. A short statement may carry the decision. A longer paragraph may explain a difficult dependency. A table may compare options. A scenario may show the service under pressure.

The answer should feel written by someone who understands the work, not assembled by a sentence machine.

Human cadence without carelessness - Natural professional writing is not perfectly symmetrical. Paragraphs vary. Some sentences stop quickly. Others carry qualification because the subject requires it. Concrete details interrupt abstraction. Dialogue or a brief operational scene can make a control visible.

That does not justify deliberate grammatical mistakes.

Use asymmetry rather than error:

- mix short, medium and occasional long sentences;
- avoid three consecutive paragraphs with identical shape;
- use a fragment only when the meaning remains clear;
- move between explanation, example and instruction;
- include dates, quantities, roles, records and ordinary work;
- allow a paragraph to end on an unresolved risk before the next explains the control;

- avoid summarising every section with a polished slogan.

British English should remain consistent: organisation, programme, fulfil, licence as a noun, practise as a verb, judgement, mobilisation and authorised. Use day-month-year dates. Use pounds where the context is British.

The purpose is credibility, not imitation of untidiness.

Plain English and technical precision - Plain English means the reader can understand the intended meaning without unnecessary effort. It does not mean removing technical detail.

Replace vague corporate words with actions.

'We will leverage a robust governance framework' becomes 'The contract manager chairs a fortnightly service review, records actions in the shared log and escalates any red service level to the operations director within one working day.'

'We have extensive experience' becomes a relevant case, measure and lesson.

'Regular communication' becomes channel, frequency, owner and trigger.

Be careful with absolutes. 'Always', 'guarantee', 'zero risk' and 'will never fail' create commercial and evidential exposure. Use commitments that the organisation can own.

Customer language, not mimicry - Use the customer's defined terms where they improve traceability. Do not copy awkward phrases so heavily that the response loses clarity.

Create a terminology dictionary for the bid. Record customer names for services, sites, users, roles, measures and systems. Resolve internal synonyms.

Redfern called the role 'Neighbourhood Response Officer' in one answer, 'Local Service Adviser' in another and 'Community Liaison Lead' in the pricing schedule. All referred to the same person. The inconsistency made the solution appear larger and less controlled than it was.

One dictionary fixed forty-three references.

Commitments must be extracted - Writers create obligations through verbs, dates, quantities and service descriptions. Extract them during drafting, not after submission.

A promise register records:

- commitment text;
- requirement and answer location;
- delivery owner;
- measure and timing;
- cost or resource;
- dependency;
- approval;
- transfer status.

Natural-language tools can identify candidate commitments, but a competent person decides meaning. 'We aim to' may be an aspiration. 'We will provide' is usually a commitment. Context matters.

At Redfern, extraction found that the draft promised weekly resident drop-ins at twenty-four sites. The solution budget contained twelve monthly sessions. The team redesigned the engagement model and wrote the answer accurately.

Figures need a definition - Every material number should have bones: source, definition, period, population, baseline and owner.

'Ninety-eight per cent satisfaction' prompts questions. Among whom? Over what period? How many responses? Which question? Was the survey independent? How relevant is it to this service?

Use ranges when false precision would mislead. Separate measured, modelled and target results.

A good sentence can admit limits:

> *> Across 1,842 completed repairs during the twelve months to 31 March 2026, 93.6 per cent were completed within the agreed appointment window. The proposed contract covers a larger rural area, so our mobilisation model uses a lower 91 per cent planning assumption until route data is validated.*

The limitation is not weakness. It shows control.

Visuals need one decision job - Use a visual when it reveals sequence, relationship, responsibility, comparison or control more efficiently than prose.

Give it a message title. Make labels readable at print size. Check black-and-white contrast. Provide enough surrounding explanation that the evaluator understands why it matters.

Do not place dense text inside an image to escape word count unless the instructions clearly permit it. Do not use a process diagram that disagrees with the narrative or contract.

Redfern removed a decorative 'customer journey' and replaced it with a one-page escalation route showing trigger, owner, response time, customer communication and recovery. The visual became evidence of design rather than design style.

AI-assisted drafting - AI can help extract requirements, compare documents, suggest structures, identify inconsistencies, summarise approved evidence and generate alternative wording. It can also invent, flatten distinction, expose confidential material and repeat one error at scale.

Control use:

- approve tools and use cases;
- classify data before input;
- provide only necessary information;
- ground drafting in approved sources;
- require source references;

- prohibit unsupported additions;
- review facts, commitments, tone and confidentiality;
- disclose use where required;
- retain accountability with named people.

A language model is not a content owner.

Redfern tested an AI draft against the answer plan. It covered every heading, sounded confident and omitted the customer's requirement for out-of-hours safeguarding escalation. Fluency had hidden the gap.

The compliance matrix found it in seconds.

Review comments need control - Writers should not receive forty contradictory comments without priority or authority.

Classify findings:

- critical compliance or factual defect;
- major score or delivery weakness;
- commercial or contractual issue;
- minor clarity or presentation issue;
- preference.

Identify the finding owner and closure evidence. Where reviewers disagree, use the defined decision authority. Do not ask the writer to mediate an unresolved executive strategy dispute through tracked changes.

Preserve important comments until closure. Delete comment archaeology before final production.

Production is part of writing quality - Formatting can alter meaning. Tables split. Cross-references break. PDF conversion removes characters. Page limits move. Accessibility is lost. A copied answer retains the previous customer's name in a footer.

Control:

- template and styles;
- fonts and size;
- heading hierarchy;
- tables and captions;
- figure quality;
- page and word limits;
- headers and footers;
- accessibility;
- file naming;
- conversion and comparison;
- final text search for customer, competitor and placeholder terms.

The production lead should work from approved content. Designers should not rewrite technical commitments while fitting the page.

A writing-day schedule - For a complex answer due Friday:

Monday morning: confirm requirement, answer plan, solution input, evidence and owner.

Monday afternoon: interview specialists; capture gaps and decisions.

Tuesday: draft complete response; update promise and evidence registers.

Wednesday morning: technical and commercial approval.

Wednesday afternoon: independent review against score and requirement.

Thursday morning: controlled correction and verification.

Thursday afternoon: final content approval; production begins.

Friday: contingency, final release and submission activity - not planned first drafting.

Shorter bids compress the sequence. They should not delete its logic.

The read-aloud test - Read the answer aloud. Repetition, fog and improbable confidence become easier to hear.

Then ask someone who understands delivery to explain the method without looking at the text. If their explanation differs, the answer may be unclear or the design may not be shared.

Redfern's final version contained fewer superlatives and more ordinary detail. It explained who opened the local office, how resident issues entered the system, what happened when an appointment failed and which record reached the council.

The answer did not sound perfect.

It sounded operational.

CHAPTER 12

Review, Verification, Validation and Release

CASE FILE

> Northbridge Cyber booked a Red Team for 09:00.

> At 09:12 the reviewers learned that pricing was not final. At 09:18 the solution lead said the architecture diagram was illustrative. At 09:27 legal announced that the data-hosting position had changed. The review chair asked whether the team wanted review or group therapy.
>
> Nobody laughed, which was probably fair.

> A review cannot assess maturity that does not exist.

Define the review question - Every formal review needs a specific purpose. 'Make it better' is not a review criterion.

Possible review purposes include:

- test customer and competitive strategy;
- confirm solution feasibility;
- assess outline coverage and evidence;
- evaluate the developed response as a scorer;
- reconcile commercial and narrative positions;
- verify compliance and factual accuracy;
- validate mobilisation or service operation;
- authorise final release.

Use names that the organisation understands. Colour labels are useful shorthand only when their purpose is defined.

Review entry criteria - Before the review starts, confirm that required inputs are available.

For a near-final evaluator review, entry criteria may include:

- complete draft against every scored component;
- current compliance matrix;
- approved solution baseline;
- reconciled price;
- evidence references;
- resolved material assumptions;
- word or page compliance;
- known departures and risks;
- reviewer pack and scoring guidance.

If entry criteria are not met, decide whether to postpone, change the review purpose or proceed with explicit limitations.

Northbridge converted the failed Red Team into a solution-risk review. Reviewers stopped marking prose and focused on hosting, architecture, price and customer dependencies. The actual Red Team moved by forty-eight hours.

The schedule suffered less than pretending.

Reviewer competence and independence - Choose reviewers for the question being tested.

A technical reviewer needs relevant expertise. A commercial reviewer needs to understand the pricing mechanism and risk. An evaluator-style reviewer needs the criteria, enough customer context and independence from authorship. An accessibility reviewer needs competence beyond personal preference.

Independence is proportional. In a small company, complete separation may be impossible. Use cross-review, external support or a reviewer from another service line. At minimum, ask the author to step out of the evaluator role.

Reviewers should declare conflicts and limits. A senior title does not create technical competence.

Brief reviewers properly - Provide:

- review purpose;
- maturity expected;
- customer and procurement context;
- criteria and scoring scale;
- issues already known;
- areas out of scope;
- finding categories;
- time available;
- method for recording findings;
- decision and escalation route.

Tell reviewers not to rewrite unless rewriting is the assigned task. A good finding explains the evaluator conclusion, evidence and effect.

Weak: 'Needs more punch.'

Useful: 'The response describes monitoring but does not state the service-level threshold, owner or corrective route. The evaluator cannot conclude that missed events will be controlled. Major finding against criterion 3(b).'

The second finding can be closed.

Score before editing - An evaluator review should reach a judgement before changing language.

Ask each reviewer to record:

- likely score or confidence level;
- reason and evidence from the text;

- missing information or unresolved doubt;
- severity;
- single most valuable correction.

Only then discuss improvement.

This prevents review from becoming collaborative polishing. It also creates data. Compare internal review forecasts with actual evaluator feedback over time. If internal reviewers award sevens and buyers award fours, calibration is needed.

Verification checks conformity - Verification confirms that specified inputs and requirements have been met.

Bid verification includes:

- every requirement addressed;
- claims trace to approved evidence;
- figures reconcile across documents;
- solution and price agree;
- contractual departures are correct;
- mandatory forms are complete;
- commitments have approval;
- word, page, file and format rules are met;
- changes have propagated;
- production output matches approved content.

Use methods suited to the risk: independent check, automated comparison, recalculation, checklist, document diff, test conversion or source verification.

A spellcheck is verification of spelling. It is not verification of the offer.

Validation checks intended use - Validation asks whether the proposed service or output can achieve the intended result under realistic conditions.

For a bid, validate through:

- mobilisation rehearsal;
- capacity or queue simulation;
- service walkthrough;
- user test;
- prototype or demonstration;
- disaster or continuity scenario;
- partner confirmation;
- pricing stress test;
- reference comparison;
- delivery-owner challenge.

Northbridge validated its incident response by running a tabletop exercise. The proposed escalation required customer approval before containment. The contract expected immediate protective action. The process was redesigned and the answer changed.

No grammar review would have found that.

Review levels - A balanced review system might include:

Strategy review: before major capture investment or immediately after solicitation. Tests customer, competition, route, strategy and no-bid conditions.

Solution review: before full drafting. Tests requirements, design, resources, risks, price basis and evidence.

Outline or Pink review: when answer plans and early content exist. Tests coverage, story, proof and gaps.

Evaluator or Red review: near-complete content. Tests scoring, confidence, compliance, differentiation and deliverability.

Commercial reconciliation: tests cost, price, narrative, contract and assumptions.

Gold or executive review: tests material position, residual risk and leadership approval. It should not become unrestricted copy-editing.

White-glove or production check: tests final files, completeness, formatting, accessibility and portal packaging.

Release review: confirms defined criteria and authorises submission.

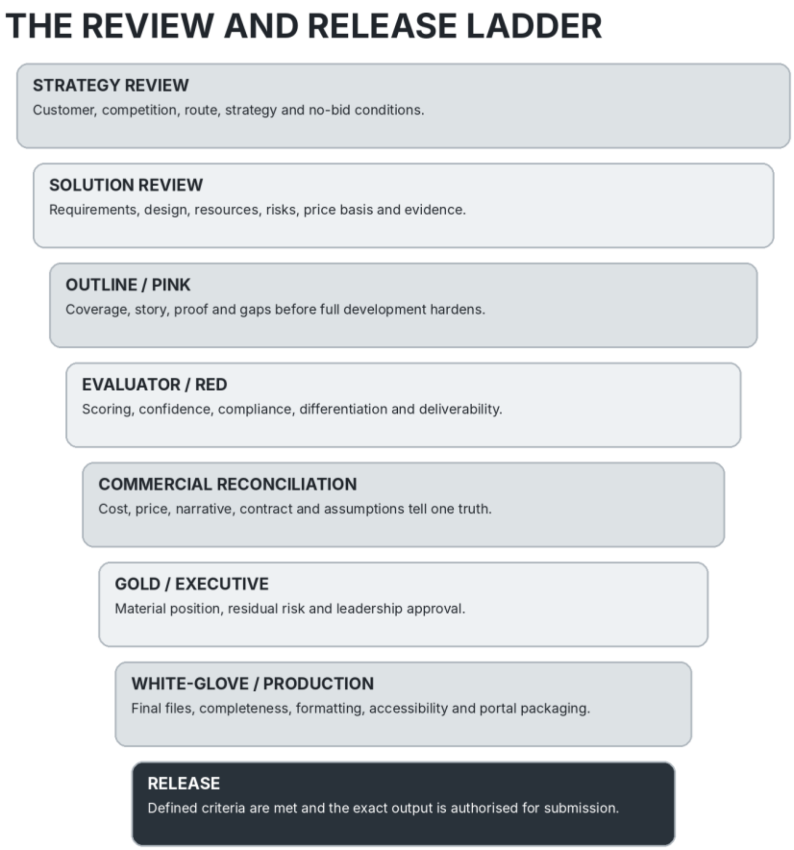

FIGURE 5 | THE REVIEW AND RELEASE LADDER

Not every bid needs every named review. The risks still need control.

Finding severity - Use a simple scale.

Critical: likely exclusion, non-compliance, false statement, unacceptable legal or commercial exposure, or inability to deliver.

Major: material loss of score or confidence, unsupported key claim, significant inconsistency or unresolved design risk.

Minor: local clarity, evidence or presentation weakness with limited effect.

Observation: improvement opportunity or preference not requiring closure for release.

Define whether a critical or major finding blocks progression. Record risk acceptance where a finding remains open.

Northbridge's review produced two critical, eleven major and thirty-four minor findings. The team initially celebrated closing forty-two. One critical remained.

Count by severity, not activity.

Closure is a separate control - A comment marked 'done' does not prove the issue is corrected.

For each material finding, record:

- finding and source;
- severity;
- owner;
- action;
- affected outputs;
- due date;
- verifier;
- closure evidence;
- residual risk and acceptance if applicable.

The person who made the correction should not always verify it. Critical compliance and commercial findings deserve independent closure.

Where one correction affects several documents, check the whole chain.

Review behaviour - Review rooms fail through behaviour as often as method.

Authors become defensive. Reviewers perform intelligence. Executives reopen strategy without accepting schedule impact. Specialists disappear after leaving comments. Chairs allow discussion to consume closure time.

Set rules:

- attack the output, not the author;
- source claims;
- distinguish defect from preference;
- do not introduce an unapproved solution through comment;
- record decisions;
- time-box debate;
- assign ownership before leaving;
- preserve safe challenge.

The chair protects the review purpose. That may require stopping a senior person who is editing punctuation during a contract-risk discussion.

Automated quality checks - Automation is effective for bounded checks:

- missing sections or placeholders;
- inconsistent names, dates and numbers;
- defined terminology;
- broken links and cross-references;
- word and page count;
- duplicated text;

- readability flags;
- file naming and size;
- document comparison;
- commitment candidates;
- accessibility indicators.

It is weaker at strategic truth, transferability of evidence, commercial judgement and whether a method will work on Monday morning.

Use automated findings as inputs to competent review, not as a certificate of correctness.

Final release criteria - Release is a decision that the output meets defined requirements and is authorised for submission.

Criteria may include:

- current document baseline used;
- compliance matrix independently verified;
- mandatory attachments complete;
- critical and major findings closed or formally accepted;
- price approved and reconciled;
- legal and contract positions approved;
- claims and commitments authorised;
- final content approved;
- production and accessibility checks complete;
- portal rehearsal complete;
- submission files listed and locked;
- authorised release signatory recorded;
- contingency and support route available.

Do not sign an empty checklist in advance.

Release authority - Define who may release by opportunity class. The bid manager may release Standard bids once approvals exist. Enhanced or Strategic bids may require executive or board release. Specialist schedules may need functional approval.

Release authority should be able to refuse. If refusal is impossible because the deadline is close, the earlier controls have failed.

At Northbridge, the proposal director held release authority. The managing director could direct a risk acceptance, but it had to be recorded. He could not simply send a different file to the portal.

The final file comparison - Production can alter approved content. Compare final output with the approved source.

Check:

- missing or duplicated pages;
- changed text;
- truncated tables;

- lost symbols or fonts;
- unreadable diagrams;
- incorrect headers or footers;
- broken bookmarks or links;
- page numbering;
- file metadata;
- hidden comments or tracked changes;
- customer and competitor names;
- accessibility and print legibility.

Render the PDF and inspect it. Do not assume conversion succeeded because the file opens.

Release under pressure - If a material issue appears after release, use controlled emergency change.

1. Stop submission if possible.
2. Record the issue and source.
3. Assess compliance, customer, solution, price, contract and schedule impact.
4. Identify required approvals.
5. Correct the controlled source.
6. reproduce and reverify affected outputs.
7. update the release record.
8. preserve the event for post-bid analysis.

Do not edit the final PDF directly unless the process explicitly controls that method and verification.

At 10:52, Northbridge found a wrong customer system name in one diagram. The submission deadline was 12:00. The issue was not material to solution or price, but it affected credibility. The team corrected the source, regenerated the PDF, compared pages, reran the release check and uploaded at 11:18.

No one called the process agile.

They used it.

Review performance - Measure:

- reviews held at intended maturity;
- critical and major findings per stage;
- repeat findings;
- finding closure time;
- post-freeze changes;
- internal score forecast versus evaluator score;
- defects found after release;
- review hours and rework;
- delivery issues linked to missed review findings.

A reduction in findings may mean improvement. It may also mean weaker review. Pair volume with severity and later outcomes.

The review of the review - After the result, ask:

- did each review happen at the right time;
- were reviewers competent;
- did criteria reflect the evaluation;
- which findings predicted buyer feedback;
- which findings were ignored and what happened;
- which comments created noise;
- what should change next time.

Northbridge's buyer feedback praised technical method and criticised weak implementation evidence. The Red Team had predicted the weakness. Leadership had accepted it because the mobilisation lead was unavailable.

The lesson was not 'write more mobilisation'.

It was to secure mobilisation competence before the review, or requalify the pursuit.

CHAPTER 13

Submission, Clarification, Negotiation and Handover

CASE FILE

Greenbank Grounds completed the final upload at 11:43.

The portal showed 'submitted'. The team took a screenshot, closed their laptops and opened a bottle of warm supermarket fizz.

At 12:16 the bid manager noticed that the screenshot displayed Lot 2. The company had intended to submit Lots 2 and 4.

The portal was closed.

Submission is not the moment a file leaves your computer. It is the controlled release, delivery and verification of the complete offer through the customer's required route.

Plan backwards from the real deadline - Set an internal deadline that preserves time for production failure, portal delay, absent approvers, file rejection and controlled correction. The margin should be protected, not treated as spare writing time.

Work backwards through:

- portal upload and verification;
- final file packaging;
- release approval;
- production and conversion;
- final content freeze;
- commercial and legal sign-off;
- closure of review findings;
- last planned customer clarification impact.

A deadline at 12:00 does not mean writing ends at 11:40.

Greenbank moved its internal release to 12:00 the previous working day for major bids. Exceptions required the executive sponsor to accept the additional risk in writing. The rule felt rigid until the first portal outage lasted ninety minutes.

Rehearse the portal - Test access early using authorised accounts. Confirm multi-factor authentication, user permissions, upload routes, lot structure, save behaviour, file limits, naming, accepted formats, browser compatibility and support details.

Where the portal permits draft uploads, use non-final rehearsal files and remove them under control. Where it does not, rehearse the exact route with screenshots or a test environment if available.

Ensure more than one authorised person can submit. Shared credentials may breach terms and destroy accountability. A deputy should have their own access and understand the process.

The submission manifest - Create a manifest listing every file to be submitted, including lot, response section, filename, format, size, version, source approval and upload status.

The release approver checks the manifest against the customer requirements and final files. The uploader checks the portal against the manifest. A second person verifies the portal after upload.

For Greenbank, the manifest would have made Lot 4 visible before celebration.

File integrity - Lock final files after release. Use controlled naming and, for higher-risk submissions, checksums or document hashes to confirm that the uploaded file matches the approved baseline.

Retain:

- final submitted files;
- release record;
- submission manifest;
- portal receipt and confirmation;
- screenshots where useful;
- date and time;
- person uploading and verifying;
- customer messages;
- any support ticket or incident.

Do not rely on a screenshot alone if the portal provides a formal receipt. Do not rely on a receipt alone if it lists only a package name and the portal still displays individual files for verification.

When the portal fails - Follow the customer's instructions. Record the failure, time, evidence and support contact. Do not invent an alternative route unless authorised.

If the portal rejects a file:

1. preserve the error evidence;
2. identify whether the issue is format, size, naming, corruption or access;
3. use the controlled source to correct it;
4. reverify content and release status;
5. upload and confirm;
6. record the incident for later review.

Do not compress a PDF until text becomes unreadable. Do not remove an attachment because the portal is inconvenient. Escalate while the route remains open.

Post-submission control - The pursuit remains active after submission. Customer clarifications, presentations, reverse auctions, negotiations, evaluation notices, best-and-final offers or contract finalisation may follow.

Retain the submitted baseline so any response can be assessed against what was offered. A clarification should explain or correct within the permitted process, not quietly redesign the service unless the customer allows it.

Log:

- customer request and deadline;
- source and authority;
- affected requirement, solution, price and contract;
- response owner;
- approval and release;
- change to commitments;
- communication and receipt.

A post-submission answer can become part of the contract. Treat it with the same care as the tender.

Clarification is not casual correspondence - Greenbank received a question asking it to confirm whether weekend call-outs were included in the fixed fee. The account director replied 'yes' from his phone. The pricing model included only two weekend events per month and charged additional events separately.

The reply was stopped before sending because all customer communication passed through the bid manager. The final response explained the included allowance and the contract rate beyond it.

One controlled route prevented a two-letter answer from changing margin.

Presentations and oral evaluation - An oral presentation is a service demonstration under evaluation. Plan and control it.

Determine:

- customer instructions and criteria;
- permitted attendees and roles;
- messages and evidence;
- demonstration environment;
- questions and decision authority;
- commercial boundaries;
- rehearsal and validation;
- version control of slides and handouts;
- accessibility and contingency;
- records and follow-up.

Use the people who can explain and deliver the offer. Train them to answer the question, disclose uncertainty honestly and avoid inventing commitments under pressure.

Rehearse hostile and ordinary questions. 'Who covers the service when this person is ill?' may matter more than a strategic challenge prepared by consultants.

Negotiation and best-and-final offers - Negotiation can change requirements, scope, risk, price and commitments. It needs controlled authority and a current baseline.

Prepare:

- objectives and walk-away points;
- approved concessions and exchanges;
- cost and margin impact;
- contract positions;
- decision roles;
- note-taking and confirmation;
- change control and reapproval.

Do not concede a service level without pricing its effect. Do not reduce price without identifying the corresponding efficiency, scope or risk acceptance. Do not rely on memory after the meeting.

Confirm agreed positions through the formal route.

Award is a switch, not a finish line - On award, activate the implementation path immediately. The bid team should not disappear after forwarding the notification.

Transfer:

- final submission and clarifications;
- contract and departures;
- pricing baseline and assumptions;
- solution design;
- mobilisation plan;
- promise register;
- partner commitments;
- risks and customer dependencies;
- evidence and performance commitments;
- social-value obligations;
- reporting and governance;
- outstanding decisions.

Delivery should accept the handover, not merely receive it.

Use a signed or recorded acceptance that identifies open items, owner and due date. Where delivery rejects a commitment as unclear or impossible, escalate before contract start.

The promise register becomes operational - Extract every material commitment into the mobilisation plan and contract-management system. Assign owner, timing, measure, evidence, cost and escalation.

A tender may promise monthly reporting, a thirty-day mobilisation, named specialists, training, apprenticeships, carbon data, response times, sample audits, improvement workshops and customer access. Each needs a home.

Greenbank's first controlled handover contained 117 commitments. Thirty-two were already in the contract schedule. Eighty-five existed only in narrative responses and clarifications.

The operations director stopped calling the bid 'marketing'.

Unsuccessful results need separate decisions - Loss, cancellation or delay should trigger controlled review.

Separate:

- immediate customer communication;
- factual check of the result;
- legal or procurement review where appropriate;
- request for feedback or assessment information;
- commercial and strategic learning;
- team communication;
- record closure and retention;
- future customer engagement.

Do not send an emotional challenge before competent review. Do not suppress a legitimate issue because leadership wants to appear gracious.

Preserve rights and professionalism together.

Compare prediction with result - Use the answer plan, internal review scores, risks and commercial assumptions to analyse the outcome.

Ask:

- what did we expect the evaluator to conclude;
- what did the recorded assessment show;
- which strengths transferred;
- which doubts remained;
- did price behave as modelled;
- was the gate decision sound;
- did our review predict the result;
- what process change is justified;
- what must not be inferred from one result.

A loss does not prove the process failed. A win does not prove it worked.

Customer feedback after award - The QMS must monitor customer perception. The bid process can contribute by tracking the quality of transition, clarity of commitments and accuracy of the offer.

Ask delivery after thirty, sixty and ninety days:

- which tender assumptions were wrong;
- which promises were difficult to interpret;
- which resources were underpriced;
- which controls worked;
- what customer feedback has been received;
- what evidence can be created;
- what future bid content must change.

The feedback should reach process owners and management review.

Submission day checklist - Before upload:

- final release recorded;
- portal and accounts available;
- manifest agreed;
- files locked and correctly named;
- formats and sizes confirmed;
- lot structure checked;
- signatures and declarations complete;
- pricing schedules recalculated and opened;
- final PDFs rendered and inspected;
- tracked changes and comments removed;
- malware or security checks completed where required;
- backup connection and deputy available.

During upload:

- upload against manifest;
- verify each file and lot;
- save progress as permitted;
- record errors and corrections;
- submit with protected contingency.

After upload:

- confirm status;
- obtain receipt;
- compare portal contents with manifest;
- retain evidence;
- notify authorised stakeholders;
- keep the team available until the deadline passes.

The fizz can wait twelve minutes.

The handover audit - Choose one awarded contract and trace three commitments from tender source to live delivery record.

Can operations find the wording? Is the measure defined? Was the cost allowed? Does the customer understand the same commitment? What happens if performance fails? Has the first evidence been retained?

Greenbank traced weekend response, biodiversity reporting and apprentice hours. Two were controlled. Apprentice hours had an owner but no recruitment route or budget.

The issue was corrected during mobilisation. The next bid required social-value cost and delivery approval before release.

The submission had ended.

The system had not.

CHAPTER 14

Documented Information, Knowledge and Change

CASE FILE

> Maven Consulting's bid library contained 8,406 files.

> The oldest was a capability statement from 2013. The newest was a case study uploaded that morning. Six files were called `ISO Certificate Current.pdf`. Four were expired. One belonged to a former parent company.
>
> The library was centralised.

> That was the only encouraging fact.

Documented information has two jobs - Some documented information is maintained to support operation: policies, process maps, templates, instructions, criteria, role descriptions and approved content.

Other information is retained as evidence of results: gate decisions, reviews, approvals, audit records, submissions, receipts, competence evidence, corrective actions and management review outputs.

One document can perform both jobs, but the distinction helps. A blank release checklist guides work. A completed release checklist proves the decision.

Control should cover creation, approval, identification, format, access, distribution, storage, change, retention, protection and disposal as relevant.

Use the minimum useful architecture - A practical bid QMS might contain:

Level 1 - direction: scope, policy, objectives and top-level process map.

Level 2 - process controls: process cards or procedures for qualification, capture, bid management, design, review, release, handover, audit and corrective action.

Level 3 - working tools: gate record, compliance matrix, answer plan, risk log, review form, promise register, release checklist and handover pack.

Level 4 - records and evidence: completed bids, approvals, receipts, feedback, audit evidence, performance data and lessons.

The levels are optional. The logic is not.

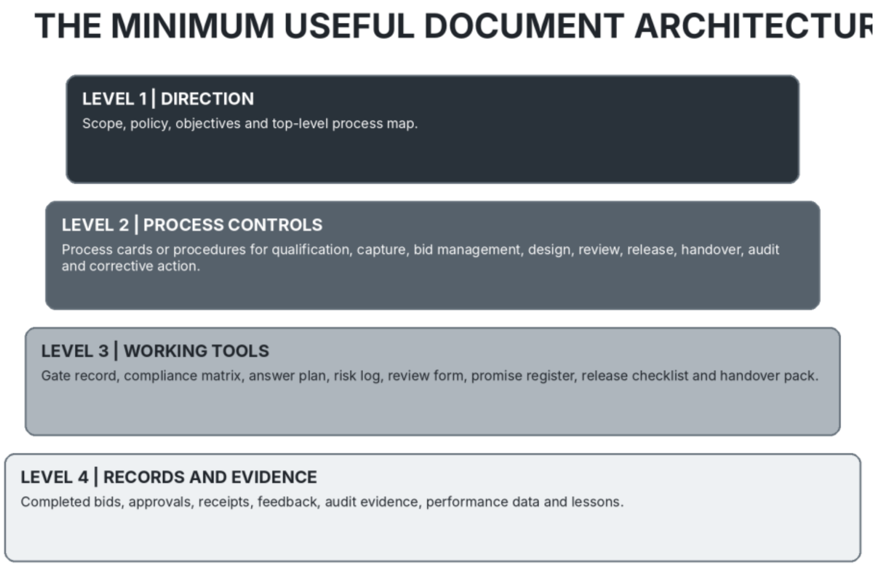

FIGURE 6 | THE MINIMUM USEFUL DOCUMENT ARCHITECTURE

Do not create a procedure merely because the standard has a clause. Create what people need to perform and control work.

Naming is a small control with large consequences - Use a consistent scheme that identifies opportunity, lot, document, stage, version and status without creating filenames too long for portals.

Example working name:

`BC-2026-041_Lot2_Method-Statement_Q3_v0.7_DRAFT.docx`

Example released name required by customer:

`Lot2_Q3_Method_Statement.pdf`

The internal system links the customer filename to the controlled source and release record.

Avoid `FINAL`, because final becomes a historical claim the moment anything changes. Use status: Draft, Review, Approved, Released, Submitted, Superseded.

One authoritative source - Every material output needs one controlled source. Copies may exist for review or production, but authority should be clear.

Maven used a proposal workspace with permissions by stage. Writers edited controlled sections. Approved evidence came from the library through links. Final production drew only from content marked approved. Released files moved to read-only storage.

The system did not prevent people downloading copies. It made copies visibly non-authoritative.

Version control follows material change - Not every spelling correction needs a formal change request. Define materiality.

Material changes include those affecting requirements, solution, price, contract, evidence, risk, commitments, compliance or approved meaning. These require impact assessment and reapproval proportionate to risk.

Minor editorial changes can use normal version history and review.

The distinction should be understood. A 'small wording improvement' that changes 'may' to 'will' is material.

Approval should be visible - Approval may be recorded through workflow, digital signature, controlled status, meeting decision or another reliable method. It should identify what was approved, by whom and when.

Email approval can work if the item and version are clear and the record is retained. 'Looks fine' in a chain containing four attachments is weak.

Use approval wording:

> *> I approve Solution Baseline v1.3 dated 18 August 2026 for final content development, subject to the two open assumptions listed in section 9.*

The statement has edges.

Retention and disposal - Retain information for business, contractual, legal, regulatory, learning and certification needs. Do not keep everything indefinitely.

Define categories and periods:

- source tender documents;
- submitted bids and clarifications;
- pricing and approvals;
- customer and personal data;
- contracts and handover;
- evidence permissions;
- review and audit records;
- unsuccessful drafts;
- AI prompts or logs where retained;
- partner information.

Consider limitation periods, contract requirements, confidentiality, data-protection principles and practical learning value. Apply legal advice where required.

Secure disposal matters. An expired bid folder containing employee CVs and customer data is not harmless because nobody opens it.

Organisational knowledge is operational memory - ISO 9001 asks the organisation to determine and maintain knowledge needed for its processes and conformity, and to address changing needs.

Bid knowledge includes:

- customer and market understanding;
- contract and procurement routes;
- solution patterns;
- pricing assumptions;
- evidence and case studies;
- regulatory knowledge;
- portal knowledge;
- partner capability;
- review findings;
- delivery lessons;
- evaluator feedback;
- specialist expertise.

Knowledge is not the same as files. It must be accessible, understandable and current enough to use.

Maven's best mobilisation lesson sat in an operations manager's notebook. The bid library could not retrieve it. The knowledge process needed a route from delivery review to approved evidence.

Build knowledge at the moment of work - Capture learning where it occurs.

After qualification: record why the opportunity was accepted or rejected.

During capture: preserve sources, assumptions and strategy decisions.

During design: retain validation results and design rationale.

During review: classify recurring findings.

After submission: preserve the released baseline and receipt.

After result: compare predictions with feedback.

During delivery: capture performance, failures, recovery and customer permission for reuse.

Waiting for an annual lessons workshop guarantees loss.

The evidence renewal cycle - Each reusable evidence item needs an owner and review trigger.

Review when:

- the underlying contract period changes;
- new performance data exists;
- customer permission changes;
- a certificate expires;
- service design changes;
- a legal or policy basis changes;
- audit identifies inconsistency;
- the evidence has not been used or checked within the defined period.

Expired evidence should not disappear; it should be blocked from unqualified use.

Maven's library displayed status: current, review due, restricted, superseded or withdrawn. Search results showed current material first. Writers stopped assuming that the first file was the right one.

Knowledge has access boundaries - Not everyone should see everything. Control customer-confidential information, personal data, commercially sensitive pricing, security information and partner material.

Use role-based access, data classification, confidentiality terms, secure transfer and audit logs where proportionate. Minimise data copied into live bid spaces. Remove access when people leave the team.

External consultants should receive only information necessary for their role. A freelance writer does not need the full pricing model to edit a method statement.

Change to the QMS - Changes to the management system should be planned. Consider purpose, consequences, integrity, resources and responsibilities.

Bid-process changes may include:

- new CRM or proposal platform;
- introduction of AI;
- revised gate model;
- acquisition or merger;
- new sector or geography;
- outsourced proposal support;
- change in certification scope;
- new APMP-aligned review practice;
- standard revision;
- major corrective action.

Do not launch a new system during the final week of a strategic bid without a transition and fallback plan.

Maven moved its library to a new platform in stages. It migrated current evidence first, tested permissions and search, trained pilot users, reconciled records and kept the old system read-only until acceptance. One issue emerged: document owners had not been transferred correctly. The pilot caught it before full release.

Change control in a live bid - A live change record should answer:

- what changed and why;
- source and authority;
- affected requirements;
- effect on solution, price, contract, evidence, schedule and risk;
- outputs to update;
- approvals to repeat;
- owner and closure.

Use a threshold. Editorial corrections may not need the full record. Material changes do.

A customer clarification, partner withdrawal, new price assumption or executive commitment should trigger impact assessment.

Document-control audit questions - Ask a live team:

- which version is authoritative;
- how do you know;
- who may edit it;
- what is approved;
- where did this evidence come from;
- when is it reviewed;
- what changed after the last clarification;
- which files will be submitted;
- how will the final output be compared;
- what will be retained after the bid;
- who can access customer-confidential material.

If answers depend on the bid manager being present, the system is fragile.

Clean the library in four passes - Pass 1 - remove obvious risk. Expired certificates, wrong company entities, customer-confidential material without permission, obsolete policies and duplicate pricing.

Pass 2 - assign ownership. Every current item receives owner, source, status and review date.

Pass 3 - improve retrieval. Use consistent metadata, service categories, sectors, evidence types and search terms.

Pass 4 - connect performance. Create a route for contract results, audits, feedback and corrective actions to update the library.

Do not attempt to review 8,406 files individually before controlling new entries. Stop the leak, then drain the room.

The knowledge gap register - When bids repeatedly need evidence or expertise the organisation lacks, record the gap.

Examples:

- no comparable mobilisation measure;
- customer references lack current permission;
- no validated carbon baseline;
- limited evidence for rural coverage;
- pricing data not segmented by service;
- no trained deputy proposal manager;
- outdated legal guidance;
- partner due diligence incomplete.

Prioritise by likely reuse, score impact, operational value, risk and cost. Assign actions to the business, not only the bid team.

The most valuable evidence is often created through better delivery measurement, not better writing.

One controlled truth - Maven reduced its live library to 612 current items. Thousands remained archived or superseded with access controls. The number was not the success.

A writer searching 'mobilisation governance' found one current process, two approved case studies, a named owner and a note explaining where the evidence did not transfer.

The library had stopped being storage.

It had become knowledge the process could trust.

CHAPTER 15

Competence, External Providers, Technology and AI

CASE FILE

Harbour Data described its bid team as experienced.

The proposal manager had seven years in the role. The lead writer had worked on more than one hundred submissions. The pricing analyst was a qualified accountant. The solution lead knew the service better than anyone in the company.

None had been trained on the customer's new security schedule. The solution lead used an old classification. The writer repeated it. The pricing analyst costed the wrong hosting option. Experience moved the mistake faster.

Competence is not time served. It is the ability to apply knowledge and skill to achieve the intended result in the current work.

Determine competence by role and risk - For each material role, define the competence needed. Include technical, commercial, procedural and behavioural capability.

A bid manager may need:

- opportunity and requirements analysis;
- planning and resource control;
- stakeholder coordination;
- risk and change management;
- review and release discipline;
- commercial awareness;
- document and portal control;
- leadership under pressure.

A writer needs responsive structuring, evidence use, interviewing, plain English, document control and the judgement to stop when information is missing.

A reviewer needs evaluation skill, subject competence, independence and the ability to classify findings rather than rewrite from preference.

A pricing lead needs the evaluation formula, cost model, commercial assumptions, sensitivity, approval and reconciliation with narrative.

Do not create one generic 'bid competence' statement.

Evaluate competence, do not merely attend training - Training is one route. Others include supervised practice, coaching, professional certification, assessment, observation, simulation, review results and demonstrated performance.

Retain evidence proportionate to the role:

- qualifications and experience;
- assessment results;
- observed practice;
- approved work samples;
- review or audit findings;
- continuing professional development;
- authorisation for defined decisions.

A person may understand APMP concepts and still be unable to control a complex live bid. Another may be highly capable without a formal qualification. The system should recognise evidence, not status alone.

Competence gaps need action - When a gap is found, choose action:

- training;
- mentoring;
- supervised assignment;
- external specialist support;
- changed role or authority;
- improved instruction or tool;
- additional review;
- recruitment;
- no-bid where the gap cannot be closed.

Then evaluate effectiveness.

Harbour Data ran a security-schedule workshop, but the corrective measure was not attendance. Participants had to analyse a sample schedule, identify design and pricing impacts, and pass a reviewed practical exercise. The next live bid provided further evidence.

Awareness is different from competence - People should understand the quality policy, relevant objectives, their contribution, the benefits of improved performance and the consequences of failing to conform.

Make awareness local.

A writer should know that unsupported claims can become contractual obligations. A director should know that late changes bypass review and increase risk. A partner should know which customer information is restricted. An uploader should know that the receipt must be compared with the manifest.

Posters do not create awareness if daily incentives teach the opposite.

Working environment affects quality - Bid work is cognitive, collaborative and deadline-driven. The environment includes physical, social and psychological conditions.

Control:

- workload and working hours;
- quiet review space;
- remote access and connectivity;
- collaboration rules;

- safe challenge;
- handover and deputy cover;
- fatigue and breaks;
- access to source information;
- confidentiality;
- interruption during critical checks.

A tired person may be competent and still unsafe to perform final verification.

Harbour Data stopped scheduling final commercial approval after 21:00. The policy allowed emergency exception, but the default moved earlier. Pricing defects fell. No motivational programme was required.

Infrastructure and tools - Bid infrastructure may include CRM, opportunity portals, document management, proposal software, pricing models, data repositories, collaboration platforms, secure communications, computers, networks and backup connections.

Determine requirements, maintain systems and manage failure.

Ask:

- is the tool available when needed;
- are permissions correct;
- is data backed up;
- are changes tested;
- can the team work if the platform fails;
- is the system secure and lawful;
- does it preserve traceability;
- are users competent;
- who owns support.

Technology should reduce control effort. A poorly configured platform can automate confusion.

Monitoring and measuring resources - Where the bid process relies on measurement, ensure resources are suitable. This may include pricing calculations, word counts, performance data, carbon calculations, response-time models and test environments.

Validate spreadsheets and formulas. Protect locked cells. Record data sources and version. Recheck after material change.

A pricing workbook is a measuring resource in practical terms. If nobody knows who changed the formula, the commercial model is not controlled.

External providers - Freelance writers, consultants, designers, printers, data suppliers, partners, subcontractors, software providers and AI services can affect the bid output.

Control should reflect risk and influence. Determine:

- selection and approval criteria;

- competence and capacity;
- scope and deliverables;
- confidentiality and data protection;
- intellectual property;
- customer requirements;
- methods, milestones and acceptance criteria;
- communication and escalation;
- review and verification;
- performance monitoring;
- re-evaluation.

The organisation remains responsible for the submitted output.

A freelance writer scenario - A writer joins ten days before deadline. Give them an approved brief, controlled sources, terminology, access limits, schedule, review route and clear statement that technical gaps must be flagged rather than filled by inference.

Review early work before allocating more. Check factual discipline as well as style. Remove access after the assignment. Evaluate performance: timeliness, responsiveness, factual accuracy, rework, collaboration and confidentiality.

Do not judge the provider solely by whether the bid won.

Partners and subcontractors - A delivery partner is not only a content provider. Its capability may become part of the offered service.

Control due diligence, work package, price, resource, evidence, legal terms, data, mobilisation, quality, change and communication. Ensure the partner understands relevant tender requirements and reviews the final commitments affecting it.

At Harbour Data, a cyber partner approved a paragraph but had not seen the response-time schedule. The prime's promise exceeded the partner's contract. The issue was found during partner verification and corrected before release.

AI as a governed external service and internal tool - AI can sit in several roles: external cloud service, embedded software feature, drafting assistant, retrieval tool, review tool or part of the customer solution.

Control depends on use.

For bid production, establish:

- approved systems and account types;
- permitted use cases;
- prohibited data;
- data classification and minimisation;
- provider terms, retention and training use;
- access and logging;
- source grounding;
- human review and approval;
- disclosure requirements;

- incident handling;
- performance evaluation.

Do not call AI 'just a tool' to avoid provider and data risk. Do not call it a strategic transformation to avoid checking its output.

Retrieval before generation - Where AI drafts from organisational knowledge, use controlled retrieval. Return approved source material, ownership, date and limitations with the output.

Require the system to refuse where evidence is absent. A useful answer may be 'No approved source found'. That is safer than confident invention.

Review the retrieved source as well as the generated text. An obsolete policy remains obsolete when quoted accurately by a machine.

Human accountability - Assign a named owner for every AI-assisted output. That person should be able to explain the requirement, source, method, claims and commitments without relying on the generated prose.

Use AI for speed and coverage. Keep people responsible for judgement, ethics, confidentiality, customer meaning and release.

Harbour Data's AI checker found seventeen inconsistent service names. It also suggested a customer outcome unsupported by any document. The team accepted the first finding and rejected the second.

The system did not need trust. It needed control.

Communications - Determine what will be communicated, when, to whom, how and by whom.

In a bid this includes:

- gate decisions;
- customer clarifications;
- changes to requirements;
- solution and pricing baselines;
- review findings;
- partner instructions;
- release status;
- submission evidence;
- result and handover;
- audit and corrective action.

Do not allow critical decisions to exist only in chat messages. Summarise and retain them in the controlled record.

Resource review before each gate - Ask:

- are required roles named and available;
- are deputies identified;
- are competence gaps controlled;
- are external providers approved and contracted;

- are systems, access and information available;
- is the working environment safe enough for the stage;
- is contingency proportionate;
- has any resource assumption changed.

Resources are not a planning appendix. They determine whether the process can achieve its result.

Harbour Data did not become competent because everyone attended a course.

It became more competent when the right people could recognise a gap, stop an unsafe assumption and prove that they knew what happened next.

CHAPTER 16

Performance, Internal Audit and Management Review

CASE FILE

> Citywide Facilities reported a 62 per cent win rate.
>
> The board liked the number. The quality manager asked what counted as a bid.
>
> Framework admissions counted. Direct renewals counted. One cancelled procurement counted as neither win nor loss. Three tiny call-offs counted equally with a national contract. No-bids disappeared. The data covered nine months and excluded two losses because the CRM owner had left.
>
> The number was not false.
>
> It was not yet useful.

Measurement begins with a decision - Decide what needs to be monitored and measured, how, when, by whom and how results will be analysed and evaluated.

Measures should relate to process objectives, customer requirements, risk and intended results. They should help somebody decide or act.

Possible bid-process measures fall into five groups.

Pipeline and qualification: gate time, no-bid reasons, overrides, re-gates, forecast accuracy and pursuit cost.

Process control: late requirements, plan adherence, first-draft readiness, review maturity, change volume, release timing and submission defects.

Quality of output: compliance defects, evidence gaps, factual corrections, internal score forecast, evaluator score and customer feedback.

Commercial and delivery result: win rate, margin, cash assumptions, mobilisation performance, contract nonconformity linked to tender promises and customer satisfaction.

Capability and improvement: competence gaps, audit findings, corrective-action closure, evidence renewal and repeated defects.

Select a balanced set. A dashboard containing everything conceals as efficiently as a dashboard containing nothing.

Define the measure - For each KPI, record:

- purpose;
- definition;
- numerator and denominator;

- data source;
- owner;
- frequency;
- target or control limit;
- segmentation;
- known limitations;
- action trigger.

Citywide redefined win rate as awarded competitive submissions divided by decided competitive submissions, reported by opportunity class, route, sector and value band. Framework admission was shown separately. Cancelled opportunities were tracked, not hidden.

The revised rate was 38 per cent.

The board's first reaction was discomfort. Its second was curiosity.

Use leading and lagging measures - Wins and evaluator scores are lagging results. Leading indicators show whether the process is becoming ready.

Examples:

- percentage of strategic bids with capture actions completed before solicitation;
- material requirements identified within forty-eight hours;
- evidence requests closed by solution freeze;
- first drafts meeting defined maturity;
- critical review findings closed before release;
- handover completed within two days of award.

A leading measure can be manipulated, so pair it with outcomes. Teams may mark actions complete without quality. Audit samples and downstream defects provide balance.

Customer perception - Monitor how customers perceive whether needs and expectations have been fulfilled. Sources may include evaluator feedback, debriefs, clarification patterns, complaints, contract reviews, surveys, repeat awards, references, delivery performance and relationship records.

Do not treat silence as satisfaction.

For a bid service provided internally, the customer may include sales, leadership and delivery. Ask whether the process was clear, timely and useful - then compare perception with objective defects.

A sales director may be satisfied because the team said yes to everything. Delivery may be less impressed six weeks later.

Analyse, do not only report - Look for trends, segmentation, relationships and causes.

A rising win rate may come from better qualification rather than better writing. Late compliance defects may cluster in framework call-offs. Low evaluator scores may relate to one service line. Review overruns may occur when operations joins after solution freeze.

Use control charts, Pareto analysis, trend lines, scatter plots or simple tables as appropriate. Statistics should clarify, not intimidate.

Citywide found that 71 per cent of major review findings came from three causes: unclear solution ownership, late evidence and price-narrative mismatch. It stopped running generic writing training and addressed those processes.

Internal audit follows the process - An internal audit is a systematic, independent and documented process for obtaining evidence and evaluating it against criteria.

Audit the end-to-end process, not merely the procedure headings. Follow opportunities, decisions, information and outputs across functions.

Plan the audit programme considering process importance, changes, risk, performance and previous results. High-risk or weak areas may need more attention.

Auditors should be competent and sufficiently independent. A proposal manager can audit another business unit, but should not declare their own work conforming without challenge.

Audit criteria and scope - Define:

- audit objective;
- scope and boundaries;
- criteria, including ISO requirements, internal process, customer or contractual requirements;
- timing and sample;
- auditor;
- methods;
- report and follow-up.

A bid-process audit might sample one win, one loss, one no-bid and one live pursuit. This reveals different outputs and avoids selecting only tidy examples.

Process audit questions - Ask people to show work.

- What input starts this process?
- How do you know what is required?
- What decisions do you make?
- Which criteria do you use?
- What can go wrong?
- How is change controlled?
- What output do you produce and who receives it?
- How do you know it is acceptable?
- What record remains?
- What measure shows performance?
- What changed after the last failure?

Follow evidence. If the procedure says every bid is re-gated after contract review, sample records. If the records show none, the issue is not solved by editing the procedure.

Findings should be precise - A nonconformity needs objective evidence and a requirement that was not fulfilled.

Weak finding: 'Document control could be better.'

Stronger finding: 'For two of four sampled bids, material clarification responses changed pricing requirements but the compliance matrix retained the superseded source. This does not conform to the organisation's Bid Control Process section 6.4 requiring affected requirements and outputs to be updated and verified.'

Observations and improvement opportunities should be distinguished from nonconformity.

Do not inflate findings to appear rigorous. Do not soften material failures into suggestions.

Audit the interfaces - Follow a promise from capture to delivery. Follow a price assumption from solution to contract. Follow a clarification from portal to final response. Follow evaluator feedback into corrective action.

Interfaces reveal whether the system is coherent.

Citywide's audit found that bid handover occurred, but operations received a slide summary rather than the final clarifications. One clarification had changed a service level. The handover process conformed in appearance and failed in output.

The finding was major because contract delivery was affected.

Management review is a leadership decision forum - Top management reviews the QMS at planned intervals to ensure continuing suitability, adequacy, effectiveness and alignment with strategic direction.

Inputs include, as applicable:

- status of previous actions;
- changes in context and interested parties;
- customer satisfaction and feedback;
- quality objectives and process performance;
- conformity of products and services;
- nonconformity and corrective action;
- monitoring and measurement;
- audit results;
- external-provider performance;
- resource adequacy;
- actions on risks and opportunities;
- improvement opportunities.

For bid management, prepare the information in business language. Leadership needs decisions, not a recital of clauses.

A bid-QMS management review agenda

1. Strategic and market changes.
2. Customer, evaluator and delivery feedback.
3. Quality objectives and trends.
4. Qualification and portfolio performance.
5. Major process defects and nonconformities.
6. Commercial and mobilisation consequences of tender commitments.
7. Internal and external audit results.
8. Competence, capacity, systems and provider performance.
9. Risks, opportunities and standards transition.
10. Improvement decisions, resources, owners and dates.

Record outputs: changes to the QMS, process or objectives; resource needs; improvement actions; and decisions affecting products, services or customer requirements.

Avoid the annual evidence dump - Management review can be annual, quarterly or another planned frequency suitable to the organisation. A single long meeting may be too slow for a high-volume bid operation.

Use monthly operational bid-quality reviews and a formal quarterly management review that integrates QMS requirements. Smaller organisations may combine them if all inputs and outputs are covered.

The meeting should build on existing management data. Do not create a parallel quality universe.

Data integrity - Check completeness, consistency and source. Define how missing data is treated. Restrict changes where appropriate. Keep calculation logic.

A CRM field completed differently by each sales manager cannot support fine analysis. A review severity scale changed mid-year needs explanation. A win-rate report excluding losses must be corrected before leadership relies on it.

Internal audit should sample data lineage as well as process compliance.

Review whether measures cause harm - People respond to targets.

If proposal managers are measured on on-time submission alone, they may accept poor inputs and work unsafe hours. If sales is measured on pipeline value, unqualified ceilings grow. If writers are measured on words produced, the answer becomes longer. If no-bids reduce a manager's success rate, weak pursuits stay alive.

Use measures as signals, not weapons. Balance them and review unintended effects.

The quarterly question - Citywide's management review ended with one question for each objective:

What decision does this evidence require from us?

The board funded an evidence analyst, changed the Gate 2 authority, removed one duplicated review and introduced a mobilisation acceptance check. It also accepted that the lower, properly defined win rate was the baseline.

The report became less flattering. The system became more manageable.

CHAPTER 17

Nonconformity, Corrective Action and Learning

CASE FILE

> Pennine Care missed a mandatory attachment.

> The immediate explanation was simple: the bid coordinator forgot it.
>
> The quality manager asked why. The coordinator had used a checklist. The attachment was on it. She had marked it complete because the HR director said it would be sent later. The file arrived by email during upload, went to the bid manager's personal inbox and was never added to the submission manifest. The second checker compared the portal with the manifest, exactly as instructed.
>
> The coordinator had made the final mistake.

> The system had prepared it carefully.

Correction is not corrective action - Correction deals with the detected problem. Corrective action addresses the cause so that the problem does not recur or occur elsewhere.

For a live bid, correction might mean replacing a wrong file, amending a figure, withdrawing an unsupported claim or resubmitting where the customer permits.

Corrective action may change document control, handover, approval, training, system permissions, workload, criteria or leadership behaviour.

Do not launch root-cause analysis while the deadline is burning. Contain and correct first. Preserve evidence. Then investigate proportionately.

What counts as nonconformity - A nonconformity is failure to fulfil a requirement. The requirement may come from ISO 9001, internal process, customer documents, contract, law, policy or an approved decision.

Bid examples:

- mandatory requirement omitted;
- unapproved price submitted;
- expired certificate used;
- material claim unsupported;
- final file differs from approved source;
- review blocked by missing input but marked complete;
- customer clarification not propagated;
- tender promise not transferred into delivery;
- internal audit not conducted as planned;
- corrective action closed without effectiveness evidence.

Not every low score is a nonconformity. The evaluator may prefer another solution. Be precise.

Control nonconforming outputs - Identify and control outputs that do not meet requirements to prevent unintended use or delivery.

Before submission, label or quarantine nonconforming content. Prevent an unapproved case study, price or schedule from entering the release pack. After submission, assess whether customer notification, clarification, correction or other action is required and permitted.

Record the nature of the nonconformity, action taken, concessions or authority and person deciding.

Pennine could not correct the omitted attachment after deadline. The output remained nonconforming and the bid was rejected. The organisation still controlled the record and response.

Respond without blame theatre - A useful response follows this sequence:

1. contain the issue;
2. correct what can be corrected;
3. manage customer and contractual consequences;
4. preserve evidence;
5. determine whether similar issues exist;
6. investigate causes;
7. plan action;
8. implement;
9. evaluate effectiveness;
10. update risks, knowledge and the QMS.

Blame may feel decisive. It rarely explains recurrence.

Root cause is usually plural - Use methods appropriate to complexity: five whys, fishbone analysis, fault tree, barrier analysis, event timeline or structured interview.

Pennine's analysis found:

- checklist status allowed 'expected' to be marked complete;
- email was an uncontrolled handover route;
- the manifest was created before all attachments were approved;
- no rule blocked release when mandatory evidence remained conditional;
- the second check verified the wrong baseline;
- timetable left twelve minutes for late attachments;
- leadership had accepted late HR input on previous bids without consequence.

'Coordinator forgot' described the final event, not the cause system.

Corrective action must match cause - Pennine changed five things:

- mandatory items could be Complete, Not Complete or Not Applicable - never Expected;
- functional owners uploaded approved evidence directly to the controlled workspace;

- the manifest was generated from approved release items;
- any open mandatory item blocked release unless the customer requirement had formally changed;
- HR evidence deadline moved two working days earlier, with executive escalation.

The coordinator did not receive generic time-management training. She helped test the new control.

Effectiveness cannot be assumed - Set evidence and review date. For example:

- sample the next five bids;
- confirm no mandatory item was marked complete without an approved file;
- check release timing and late evidence;
- interview users;
- inspect portal manifests;
- review any similar near misses.

If the action creates excessive delay or people bypass it, the control may not be effective even if the original defect disappears.

Pennine's first version required executive approval for every attachment. It slowed bids and added no useful check. The process was adjusted before full rollout.

Near misses are cheaper evidence - Record significant near misses: the error caught before submission, the partner discrepancy discovered at review, the wrong formula stopped at release.

Do not punish people for reporting. Analyse patterns. Near misses reveal barrier weakness without customer harm.

A monthly fifteen-minute review of the most serious near miss can teach more than an annual celebration of zero reported problems.

Zero reports may mean perfection.

Usually it means silence.

Win and loss reviews are not corrective action by default - A loss review may identify improvement. Corrective action is needed when a requirement was not fulfilled or a systemic cause must be removed.

'Buyer scored mobilisation lower than expected' may lead to learning or design improvement. 'Required mobilisation dependency was omitted because answer planning did not include contract schedules' is a process nonconformity requiring correction and likely corrective action.

A win can expose nonconformity too. If the organisation submitted an inaccurate claim and won, award does not make the claim conforming.

Link delivery failure back to the bid - Contract problems may originate in tender decisions:

- unpriced service level;
- unrealistic mobilisation date;
- overstated capacity;

- unclear customer dependency;
- social-value promise without owner;
- partner obligation not agreed;
- evidence presented outside its limitations.

Tag delivery nonconformities linked to bid commitments. Feed them into qualification, design, pricing, writing and review.

Pennine's contract team found that weekend supervision had been promised in narrative but not resourced. The corrective action changed promise extraction and operations approval. It did not end with adding weekend cover to one contract.

Continual improvement is not constant change - Improve the suitability, adequacy and effectiveness of the QMS. Sources include data, audit, customer feedback, staff insight, technology, delivery performance, context change and corrective action.

Choose improvements based on evidence and strategic value. Too many simultaneous changes create another uncontrolled system.

Use an improvement backlog with benefit, risk, owner, resource, priority, test and completion criteria.

Small improvements matter:

- clearer first-draft criteria;
- earlier evidence requests;
- one terminology dictionary;
- automatic expiry alerts;
- better handover acceptance;
- fewer duplicated meetings;
- calibrated reviewer scoring;
- stronger portal rehearsal.

The corrective-action review board - For material issues, review:

- customer and business consequence;
- containment and correction;
- cause analysis quality;
- similar risks elsewhere;
- action ownership and resource;
- effectiveness evidence;
- changes to documented information, competence, risk and objectives;
- closure authority.

Keep the board proportionate. A typo does not need executive ceremony. A false declaration does.

Learning must return to work - Update the place where the future decision will occur.

A lesson about qualification changes the gate criteria. A lesson about evidence changes the evidence card or request. A lesson about review changes criteria and reviewer briefing. A lesson about handover changes the promise register and acceptance route.

Do not store 'lessons learned' in a folder without altering the process.

Pennine's rejected bid remained painful. The organisation did not turn it into a story about one careless person. It changed six points in the system and proved the controls over five later submissions.

The coordinator stayed.

The omission did not return.

CHAPTER 18

Certification Readiness and the Ninety-Day Build

CASE FILE

> Arcway Group decided to achieve ISO 9001 certification in twelve weeks because a tender asked for it in thirteen.

> The sales director found a consultant. The consultant found thirty templates. Department heads found reasons not to attend. By week eight the quality manual was complete and the process was not.
>
> The certification body asked how opportunity risk affected bid control.
>
> Arcway presented a risk procedure last opened on the day it was approved.

> A certificate deadline does not shorten the time needed to build evidence. It shortens the time available to discover that fact.

Begin with the business case - State why implementation and certification matter.

Reasons may include customer access, tender requirements, process reliability, growth, governance, integration after acquisition, risk reduction or leadership discipline. Define intended benefits and measures.

Do not promise certification by a date before speaking with suitable certification bodies, understanding readiness, audit availability and the need for implemented evidence.

Certification should confirm a working system. It cannot create history that does not exist.

Obtain the standard and competent support - Use an authorised copy of the applicable ISO 9001 edition. At the date of this book, that means the 2015 edition with Amendment 1:2024, while monitoring the expected 2026 replacement and transition arrangements.

Select advisers for competence, independence and fit. Ask how they will help the organisation understand and implement rather than merely supply documents. A consultant should not promise to guarantee certification.

For UK accredited certification, identify a certification body with appropriate UKAS accreditation and relevant scope. Verify through UKAS sources. Compare competence, sector experience, audit approach, location, availability, cost and transition support.

Gap assessment against reality - Assess the existing system against:

- organisational context and scope;
- processes and interactions;

- leadership and policy;
- risk, opportunity, objectives and change;
- resources, competence and documented information;
- operational controls across the pursuit lifecycle;
- monitoring, customer feedback and analysis;
- internal audit;
- management review;
- nonconformity, corrective action and improvement.

Use evidence. Mark each requirement as conforming, partly conforming, not conforming or not applicable with justification.

A missing document may be a small gap if the process works and evidence exists. A polished procedure may conceal a major gap if nobody follows it.

Build the process first - Prioritise the end-to-end process, high risks and customer requirements.

Minimum viable bid QMS:

- defined scope and process map;
- policy and objectives;
- roles and authority;
- opportunity and gate control;
- requirements and change control;
- solution, price and evidence control;
- writing, review and release control;
- submission and handover;
- document and knowledge control;
- competence and provider control;
- performance measures;
- internal audit;
- management review;
- corrective action.

Implement through live work. Do not wait for every document to be perfect.

Stage 1 and Stage 2 - Certification commonly includes a Stage 1 audit to assess readiness, scope, documented system, context, key processes, internal audit, management review and planning for Stage 2. Exact arrangements depend on the certification body and accreditation requirements.

Stage 2 evaluates implementation and effectiveness across the scope. Auditors sample processes, people and records. They follow evidence and may identify nonconformities requiring action before certification.

Prepare people to explain their work honestly. Do not coach scripts. An auditor can usually tell when a bid coordinator has memorised a clause without understanding the process.

Evidence before the audit - Have enough implemented history to show the system operating. Useful evidence includes:

- several gate decisions including no-bid;
- live compliance and change records;
- solution and commercial approvals;
- review findings and closure;
- release and submission records;
- handover and customer feedback;
- competence evidence;
- provider evaluations;
- objective results and trends;
- internal audit reports;
- corrective actions with effectiveness checks;
- management review decisions.

One immaculate demonstration bid is not a system.

Ninety-day implementation plan - Ninety days can establish a credible system in a focused organisation with leadership support and existing operational maturity. It may not be enough for every certification timetable. Treat this as an implementation sequence, not a promise of award.

FIGURE 7 | THE NINETY-DAY BUILD

Days 1-10 - Decide and diagnose

Confirm business case, leadership sponsor, scope, applicable standard, certification intention and project authority. Conduct context and interested-party review. Map the current end-to-end process. Complete a factual gap assessment. Identify critical legal, customer and tender requirements. Select improvement priorities.

Outputs: approved scope, project plan, current-state map, gap register, risk and opportunity priorities, certification-body shortlist.

Days 11-20 - Design the system

Agree process architecture, policy, objectives, roles, gates, opportunity classes, documented-information structure and measures. Design the top-level process and interfaces. Decide which existing tools remain and which duplicates leave.

Outputs: quality policy, objectives, process map, authority matrix, document architecture, KPI definitions.

Days 21-35 - Build operational controls

Create or revise qualification, capture, requirements, design, pricing, evidence, writing, review, release, submission and handover controls. Configure live tools. Establish change, promise and risk records. Define acceptance criteria.

Outputs: working process cards, templates, workflows, approval routes and pilot workspace.

Days 36-50 - Support the process

Assess competence. Train by role. Approve external providers and AI use. Clean current evidence. Set permissions, naming, retention and knowledge ownership. Test infrastructure and backup routes.

Outputs: competence matrix, training and assessment, provider controls, approved tools, controlled evidence set.

Days 51-65 - Pilot on live bids

Use the system on at least two different pursuits if available: one routine and one higher risk. Observe work. Record defects, friction, bypasses and missing interfaces. Adjust under change control.

Outputs: live records, pilot review, corrected controls, initial performance data.

Days 66-75 - Audit and correct

Conduct internal audits using independent competent auditors. Sample live and completed opportunities. Raise precise findings. Contain issues, determine causes and implement corrective action.

Outputs: audit plan, reports, nonconformities, corrective actions and early effectiveness evidence.

Days 76-82 - Management review

Present context, objectives, process performance, customer feedback, audit, providers, resources, risks, opportunities and improvement. Leadership decides changes and resources.

Outputs: management review record, decisions, revised objectives and action plan.

Days 83-90 - Readiness and control

Complete a readiness review against the standard. Close material gaps. Verify scope and audit logistics. Brief people on process, not scripts. Freeze unnecessary system change before Stage 1. Create the standards-transition register for ISO 9001:2026.

Outputs: readiness report, evidence index, audit plan, open-action control and transition plan.

A small-team version - A five-person bid consultancy can implement proportionately.

The managing director may be sponsor, process owner and commercial approver. One consultant may manage documents and internal audit another project. External competence can provide independence. The process may use a controlled Share-

Point site, a one-page gate, combined risk and decision log, answer plan, review record, release check and feedback tracker.

Do not imitate an enterprise. Meet requirements and control the work.

A high-volume version - A national supplier running concurrent bids needs portfolio governance, opportunity classes, resource forecasting, specialised roles, workflow systems, reviewer pools, data integration and segmented measures.

The same principles apply with more interfaces. Control should prevent local teams from creating incompatible processes while allowing sector-specific needs.

Audit across business units. Compare performance. Preserve local terminology where it works, but maintain common decision and evidence requirements.

Audit-day behaviour - Provide requested evidence promptly. Let people answer in their own words. If a record is missing, say so. Do not manufacture it during lunch.

Challenge an auditor respectfully where interpretation appears unsupported, but listen first. Certification audit is not a performance to win. It is an assessment of conformity and effectiveness.

A nonconformity is not humiliation. Treat it through the same corrective-action process used elsewhere.

After certification - Certification creates a surveillance cycle and an obligation to maintain the system. More importantly, the organisation still has customers and bids tomorrow.

Continue:

- monitoring objectives and process performance;
- internal audit;
- management review;
- competence and resource planning;
- customer and delivery feedback;
- document and knowledge control;
- corrective action and improvement;
- changes in context, standards and scope.

Do not allow the certificate anniversary to become the only time the QMS receives attention.

Transition to the new ISO 9001 edition - When ISO 9001:2026 is published, obtain the authorised standard and official transition information. Do not rely on summaries alone.

Create a controlled comparison:

- new or changed requirement;
- existing process and evidence;
- gap and risk;
- action, owner and date;
- training or communication;

- internal audit and management review;
- certification-body transition milestone.

Integrate changes into normal governance. Avoid a second quality system running beside the first.

Final readiness questions - Can leadership explain why the QMS exists and what it is achieving?

Can a bid manager follow one live opportunity through defined stages and records?

Can delivery identify the commitments inherited from a winning bid?

Can the organisation show how customer feedback, audit and failure change the process?

Can people distinguish controlled evidence from confident content?

Can the system operate when its strongest individual is absent?

Arcway postponed its certification audit by six weeks. It removed twelve templates, rewrote its scope, piloted the gate process and completed a real internal audit. The tender requiring certification was lost for another reason.

The next year, the organisation entered similar competitions with a system that existed when nobody was watching.

That was worth more than meeting the first deadline badly.

FIELD TOOLKIT

Toolkit A - ISO 9001 Clause-to-Bid Crosswalk

This crosswalk is an implementation aid, not a substitute for the licensed standard. It shows how management-system requirements can appear in an end-to-end bid operation. The exact design, evidence and applicability depend on the organisation.

Clause 4 - Context of the organisation

***4.1 Understanding the organisation and its context* - Bid meaning:** Determine the external and internal issues that affect the organisation's ability to pursue, win and deliver suitable work consistently.

Typical external issues: procurement law and policy; sector regulation; customer spending and buying routes; market concentration; competitors; inflation; labour and supply-chain conditions; technology; cyber risk; climate change; social-value expectations; geographical reach; professional standards; certification expectations.

Typical internal issues: strategy; services and delivery capability; commercial appetite; financial capacity; culture; bid volume; systems; evidence maturity; competence; leadership availability; delivery performance; partner reliance; data and information quality.

Controls: context register or management analysis; pipeline and market reviews; risk and opportunity review; standards register; triggers for material change; links to objectives and process design.

Evidence: management-review inputs; strategy decisions; revised gate criteria; resource changes; standards-transition plan; risk actions.

> **Failure pattern:** the organisation lists broad trends but makes no process decision. 'AI is a risk' appears in the register while writers continue using unapproved tools.

Audit prompts: What changed in the market or organisation during the past year? Which change altered the bid process? How was climate-change relevance determined? Who monitors the forthcoming ISO edition?

***4.2 Interested parties* - Bid meaning:** Identify parties whose relevant requirements affect the QMS and the bid service.

Possible interested parties: contracting authorities and private buyers; service users; regulators; employees; delivery teams; shareholders; partners and subcontractors; insurers; data subjects; certification bodies; professional bodies; framework managers; internal sales and finance customers.

Controls: interested-party register; source and monitoring route; customer-feedback system; partner and employee engagement; compliance obligations; review triggers.

Evidence: tender and contract requirements; stakeholder feedback; staff capacity actions; partner evaluations; regulatory updates; customer satisfaction data.

> **Failure pattern:** every imaginable party is listed, but nobody can state which requirement is relevant or how it is monitored.

Audit prompts: Which interested-party requirement most recently changed a bid control? How do delivery teams influence tender promises? Which climate-related customer requirements are monitored?

***4.3 Scope* - Bid meaning:** Define organisational and service boundaries of the QMS and how bid management fits them.

Controls: approved scope statement; sites and business units; products and services; external interfaces; applicability decisions; certification scope review.

Evidence: scope published in QMS information; certificate scope where certified; organisational chart; process map; justified applicability assessment.

> **Failure pattern:** the scope is written to match a tender rather than actual controlled activities, or the bid team is assumed to be outside the system because it does not deliver the final service.

Audit prompts: Where does the bid process start and end? Which locations and services are included? What outsourced activity affects conformity? Why is any requirement considered not applicable?

***4.4 QMS and its processes* - Bid meaning:** Determine, operate, control and improve the interrelated processes required to achieve intended results.

Controls: end-to-end process map; process cards; sequence and interactions; inputs and outputs; owners; criteria; resources; risk; measures; documented information; change and improvement.

Core records: opportunity log; gate decisions; capture plan; compliance matrix; solution baseline; price approval; review record; release record; receipt; promise register; handover; feedback; corrective action.

> **Failure pattern:** procedures mirror clauses but do not reflect work, or the process map shows meetings without inputs, outputs or acceptance criteria.

Audit prompts: Show one opportunity moving through the process. What is the intended output at each stage? How are interactions with finance and delivery controlled? Which measure indicates process effectiveness?

Clause 5 - Leadership

***5.1 Leadership and commitment* - Bid meaning:** Top management remains accountable for the effectiveness of the QMS and integrates quality into commercial and strategic decisions.

Controls: executive sponsorship; decision authorities; resource approval; review of objectives and risk; management review; customer and delivery focus; leadership escalation.

Evidence: no-bid and override decisions; resources allocated; risks accepted or reduced; objective actions; management-review outputs; leadership response to nonconformity.

> **Failure pattern:** the quality manager owns the certificate while executives bypass freeze, approve unpriced promises and remain absent from management review.

Audit prompts: How did leadership respond to the last serious bid defect? Which quality objective required executive action? How does leadership prevent commercial pressure overriding mandatory control?

***5.1.2 Customer focus* - Bid meaning:** Ensure customer and applicable legal requirements are determined, understood and consistently met, while addressing risks and opportunities affecting conformity and customer satisfaction.

Controls: requirements review; contract review; customer communication; delivery involvement; feedback and complaint analysis; risk-based gates; promise handover.

Evidence: compliance matrix; clarification records; delivery acceptance; customer feedback; contract performance; corrective action.

> **Failure pattern:** the bid is written to score but the proposed service cannot be delivered, or customer focus is treated as saying yes to every request.

Audit prompts: How does the organisation know a solution can meet customer requirements? How are later delivery failures linked back to tender decisions? Show a customer requirement that changed the process.

***5.2 Quality policy* - Bid meaning:** Establish a policy that fits purpose and context, supports strategic direction, provides a framework for objectives, and commits to requirements and continual improvement.

Controls: approved policy; communication and awareness; review during management review; link to objectives and decisions.

Evidence: people can explain relevant commitments; gate decisions reflect policy; objectives derive from policy; policy is available as appropriate.

> **Failure pattern:** generic policy signed years ago and contradicted by leadership behaviour.

Audit prompts: What part of the policy affects your role? How did the policy influence a recent no-bid or release decision? When was it reviewed?

***5.3 Roles, responsibilities and authorities* - Bid meaning:** Ensure accountability and authority are assigned, communicated and understood.

Controls: role descriptions; RACI and authority matrix; gate and release authority; process ownership; deputies; escalation.

Evidence: decisions identify approvers; people understand authority; conflicts are resolved; deputies can operate.

> **Failure pattern:** everyone contributes, nobody owns; a director can alter any document without reapproval; process performance is assumed to be the bid manager's private responsibility.

Audit prompts: Who can decline an opportunity? Who approves solution, price and release? What happens when these people disagree? Who acts when the bid manager is absent?

Clause 6 - Planning

6.1 Risks and opportunities **- Bid meaning:** Determine and address risks and opportunities so the QMS can achieve intended results, enhance desirable effects, prevent or reduce undesirable effects and improve.

Controls: strategic QMS risk; opportunity gate risk; live bid risk and issue log; risk-based process classes; mitigation and contingency; review of effectiveness.

Typical risks: missed mandatory condition; weak customer position; unverified evidence; partner failure; price-model error; data breach; late change; staff fatigue; portal failure; unowned promise; design that cannot be mobilised.

Typical opportunities: reusable evidence; improved buyer insight; automation of bounded checks; stronger partner network; earlier delivery involvement; better performance data; simplified process.

Evidence: risks change controls and resources; mitigations are implemented; residual risks are accepted by authority; outcomes inform future assessment.

> **Failure pattern:** risk register exists, but every risk is amber and no decision changes.

Audit prompts: Which bid risk led to greater verification? Which opportunity led to process improvement? How is the effectiveness of action assessed?

6.2 Quality objectives and planning **- Bid meaning:** Set measurable objectives at relevant functions and levels, consistent with policy and requirements.

Controls: objective definition; baseline; target; owner; resource; deadline; monitoring; evaluation and update.

Examples: reduce late material compliance defects; improve handover completeness; increase current evidence coverage; reduce post-freeze changes; calibrate internal review scoring.

Evidence: trend reports; actions; management decisions; objective revisions; achieved or missed results with analysis.

> **Failure pattern:** 'Improve win rate' is set without definition, baseline or control over factors.

Audit prompts: What is your current bid-quality objective? How is it measured? What action occurred when performance missed target? Has the target created an unintended behaviour?

***6.3 Planning changes* - Bid meaning:** Plan changes to the QMS or material bid system while considering purpose, consequences, integrity, resources and responsibilities.

Controls: change proposal; impact assessment; pilot; approval; communication; training; transition; verification and review.

Examples: new proposal platform; AI adoption; revised gate model; merger; new service; standard transition; outsourced bid support.

Evidence: change log; pilot results; training; updated documents; data migration checks; management review.

> **Failure pattern:** new tool introduced during a major bid without tested permissions, data migration or fallback.

Audit prompts: Show a recent planned process change. How were risks and resources considered? How did you know the change worked?

Clause 7 - Support

***7.1 Resources* - Bid meaning:** Determine and provide resources needed to establish, implement, maintain and improve the QMS and operate the bid process.

People: named roles, capacity, deputies, specialist access and leadership time.

Infrastructure: CRM, portals, document and proposal systems, secure devices, networks, pricing models, backup connections and production tools.

Environment: workload, working hours, interruption, safe challenge, confidentiality, collaboration and suitable review conditions.

Monitoring resources: validated formulas, calculators, performance data and test environments.

Organisational knowledge: current customer, service, commercial, legal, evidence and process knowledge.

Evidence: resource plans; capacity reviews; system maintenance; access tests; knowledge ownership; backups; environment actions.

> **Failure pattern:** ten pursuits approved with capacity for four; key specialist available only after solution freeze; pricing spreadsheet changes without validation.

Audit prompts: How is capacity assessed at the critical time? What happens if the portal or collaboration system fails? Which knowledge gap currently threatens bids?

***7.2 Competence* - Bid meaning:** Determine competence, ensure people are competent through suitable education, training or experience, take action where needed and retain evidence.

Controls: role competence matrix; assessment; supervised practice; professional development; authorisation; provider competence; effectiveness review.

Evidence: assessed work; review performance; qualifications; coaching records; observed competence; reduced defects.

> **Failure pattern:** training attendance is recorded but ability is not evaluated.

Audit prompts: How was this reviewer judged competent? What changed after the training? Which role currently has no competent deputy?

***7.3 Awareness* - Bid meaning:** People understand the policy, objectives, their contribution and consequences of nonconformity.

Controls: role briefings; live-bid kick-off; process induction; leadership communication; lessons and near-miss sharing.

Evidence: people explain why controls matter; behaviour matches requirements; escalations occur.

> **Failure pattern:** staff know the policy slogan but not that an unsupported claim can become contract debt.

Audit prompts: What can go wrong if you bypass this control? Which objective does your work support? When should you stop or escalate?

***7.4 Communication* - Bid meaning:** Determine internal and external communication: what, when, with whom, how and by whom.

Controls: customer communication route; clarification log; gate and change notification; partner communication; review findings; release and result notices; handover.

Evidence: decisions and customer messages retained; changes reach affected owners; partner instructions are consistent.

> **Failure pattern:** important decision remains in private chat; account director answers post-submission clarification without commercial review.

Audit prompts: How do you know a customer clarification reached pricing and writing? Who may communicate with the customer during a live procurement?

***7.5 Documented information* - Bid meaning:** Maintain and retain sufficient controlled information for effective operation and evidence.

Controls: identification, format, approval, access, version, distribution, storage, protection, retention, disposal, external documents and change.

Evidence: current process documents; approved templates; controlled tender baseline; release records; secure archives; superseded status.

> **Failure pattern:** central library contains expired and duplicate evidence; FINAL filenames have no status meaning.

Audit prompts: Which version is authoritative? How are external tender documents controlled? How is customer-confidential information protected? How are retention periods decided?

Clause 8 - Operation

***8.1 Operational planning and control* - Bid meaning:** Plan, implement and control the processes needed to meet requirements and implement risk actions. Establish criteria for processes and acceptance of outputs, provide resources, retain evidence and control planned and unintended changes.

Controls: opportunity class; bid plan; milestones; entry and exit criteria; resource allocation; risk and issue control; baseline and change; review and release; external-provider integration.

Evidence: approved plan; schedule; process records; change log; acceptance decisions; contingency use.

> **Failure pattern:** a generic schedule is copied into the bid without considering partner lead time, contract review or portal requirements.

Audit prompts: What criteria defined review readiness? Which unplanned change occurred and how was it controlled? How did risk influence the depth of control?

***8.2 Requirements for products and services* - Bid meaning:** Communicate with the customer, determine requirements, review the organisation's ability to meet them and control changes.

Customer communication: market engagement, clarifications, presentations, negotiation, feedback, complaints and contract communication through permitted routes.

Determining requirements: stated tender and contract requirements, legal and regulatory obligations, customer dependencies, service needs, internal promises and requirements necessary for intended use.

Review: confirm requirements, resolve differences, assess capability, record assumptions and obtain competent approval.

Change: update controlled information and ensure affected people understand revised requirements.

Evidence: document baseline; compliance matrix; contract review; clarification log; gate decisions; customer correspondence; change impacts.

> **Failure pattern:** the team answers the question but overlooks a contract schedule, or a clarification changes price and only the writer is told.

Audit prompts: Show one requirement from source to final response. How was ability to meet it reviewed? How are ambiguous or conflicting requirements resolved? How are changes communicated?

***8.3 Design and development* - Bid meaning:** Where the organisation designs or adapts a customer-specific solution, plan and control design.

Planning: stages, responsibilities, reviews, verification, validation, interfaces, resources, customer involvement and evidence needed.

Inputs: requirements, laws, standards, experience, service data, risks, customer dependencies and commercial boundaries.

Controls: reviews, verification, validation, problems and actions.

Outputs: service model, staffing, mobilisation, technology, governance, performance, partner scope, risk controls, commercial assumptions and information needed for delivery.

Changes: identify, review, control, assess impact and retain evidence.

Evidence: design brief; solution baseline; workshop decisions; simulation; prototype; approval; change record; design-output handover.

> **Failure pattern:** writers create the solution in prose, or the narrative, price and mobilisation each use a different design.

Audit prompts: Why is design applicable or not applicable? What were the design inputs? How was the difficult day validated? Who approved design changes? How can delivery use the outputs?

8.4 Control of externally provided processes, products and services - **Bid meaning:** Control external contributors whose work affects the bid or offered service.

Providers: partners, subcontractors, freelance writers, consultants, designers, software and AI providers, data providers, printers and specialist reviewers.

Controls: selection, due diligence, scope, competence, instructions, confidentiality, customer requirements, acceptance criteria, monitoring, verification and re-evaluation.

Evidence: approved-provider list; contracts; briefs; partner letters; performance reviews; due diligence; output acceptance; access removal.

> **Failure pattern:** capability is promised from a partner who has not approved the scope, or a consultant uses customer data in an unsuitable tool.

Audit prompts: How was the provider selected? Which customer requirements were communicated? How is output verified? What happened after poor performance?

8.5 Production and service provision - **Bid meaning:** Develop the proposal under controlled conditions.

Controls: approved inputs; answer plans; suitable work instructions; competent people; controlled tools; evidence; monitoring; identification and traceability; customer property; preservation; post-delivery activity; change control.

Identification and traceability: answer IDs, requirement links, evidence sources, file versions, commitments and approvals.

Customer or external-provider property: tender documents, data, intellectual property, samples, systems access and confidential information must be identified, protected and incidents reported.

Preservation: protect readability, integrity, confidentiality, availability and correct packaging through writing, production, transfer and archive.

Post-delivery activity: clarification, handover, feedback, retention, reference permission and contract learning.

Evidence: controlled drafts; source links; issue logs; customer-property incidents; final files; retention records.

> **Failure pattern:** approved content is altered during production, or a customer-provided dataset is copied into an open workspace.

Audit prompts: What controls the current draft? How can a claim be traced? How is customer property protected? Which post-submission activities remain part of the process?

***8.6 Release of products and services* - Bid meaning:** Do not submit until planned arrangements are completed satisfactorily, unless a competent authority approves otherwise.

Controls: release criteria; authorised approver; compliance and commercial checks; final file verification; submission manifest; evidence of conformity; traceability to releaser.

Evidence: signed or digital release record; closed findings; approvals; final files; manifest.

> **Failure pattern:** release checklist is completed before files are final, or the person uploading decides that an open critical issue is acceptable.

Audit prompts: Who authorised this submission? What evidence supported release? Which criteria can block it? How are exceptions handled?

***8.7 Control of nonconforming outputs* - Bid meaning:** Identify and control outputs that do not meet requirements to prevent unintended use or delivery.

Controls: status and quarantine; correction; customer notification where required; concession or risk acceptance; re-verification; record of action and authority.

Examples: wrong pricing schedule, unsupported claim, expired certificate, incomplete form, final PDF with missing pages, promise rejected by delivery.

Evidence: issue record; corrected version; approval; customer communication; concession; corrective action where systemic.

> **Failure pattern:** an unapproved file remains in the release folder and is uploaded accidentally.

Audit prompts: How are nonconforming items identified? Who can accept a concession? What happens when the issue is found after submission?

Clause 9 - Performance evaluation

***9.1 Monitoring, measurement, analysis and evaluation* - Bid meaning:** Determine information needed to evaluate process performance, QMS effectiveness and customer perception.

Possible measures: gate cycle time; no-bid and override outcomes; requirement defects; first-draft readiness; review severity; release timing; submission defects; evaluator scores; win rate; margin; handover completion; delivery failures linked to bids; evidence renewal; corrective-action effectiveness.

Controls: KPI definitions; data source; owner; frequency; analysis; target or control limit; segmentation; action trigger; data integrity.

Customer perception: evaluator feedback, debriefs, complaints, delivery reviews, references, repeat awards and stakeholder feedback.

Evidence: dashboards; analysis; management decisions; objective results; customer feedback; data corrections.

> **Failure pattern:** a flattering win rate is reported without definition, or measurement drives unsafe behaviour.

Audit prompts: Why is this measure used? What decision did the latest result cause? How is customer perception monitored? How is data accuracy checked?

***9.2 Internal audit* - Bid meaning:** Conduct planned, objective audits to determine whether the QMS conforms and is effectively implemented and maintained.

Controls: risk-based audit programme; objectives, scope and criteria; competent independent auditors; process-based sampling; reports; correction and corrective action; follow-up.

Evidence: programme; audit plans; evidence notes; findings; reports; action and closure.

> **Failure pattern:** audit checks whether procedures exist but never follows a live opportunity or tests effectiveness.

Audit prompts: How were audit priorities selected? What makes the auditor independent? Show a finding based on objective evidence. How was follow-up performed?

***9.3 Management review* - Bid meaning:** Top management reviews whether the QMS remains suitable, adequate, effective and aligned with strategy.

Inputs for bid management: context change; customer feedback; objectives; process and submission performance; nonconformity; audit; providers; resources; risk actions; improvement; standards transition.

Outputs: decisions on improvement, QMS change, resources, objectives, process and customer requirements.

Evidence: planned meeting; complete inputs; decisions; owners and dates; follow-up.

> **Failure pattern:** annual meeting reads a report and records 'continue as is' despite repeated bid defects.

Audit prompts: What decision from management review changed the bid process? How are overdue actions followed? How does leadership assess resource adequacy?

Clause 10 - Improvement

***10.1 General improvement* - Bid meaning:** Identify and select opportunities to meet requirements, enhance customer satisfaction, prevent or reduce undesirable effects and improve QMS performance.

Sources: data, customer feedback, staff insight, audit, technology, delivery performance, standards changes, competitor learning and corrective action.

Evidence: improvement backlog; pilots; revised process; results; management decisions.

> **Failure pattern:** every idea becomes a project, or improvement means adding another form without testing benefit.

Audit prompts: Which recent improvement changed customer or process performance? How was priority chosen? What evidence shows benefit?

***10.2 Nonconformity and corrective action* - Bid meaning:** Respond to nonconformity, control and correct it, deal with consequences, determine causes, assess similar risk, implement action, evaluate effectiveness and update the QMS.

Controls: issue classification; containment; correction; root-cause method; action; owner; due date; effectiveness; risk and document update.

Evidence: nonconformity record; analysis; action; sampling; effectiveness review; revised process.

> **Failure pattern:** 'retrain staff' is used for every issue, or corrective action closes when a document is updated rather than when effectiveness is shown.

Audit prompts: What was the cause rather than the final error? Where else could it occur? How was action evaluated? Which risk or process changed?

***10.3 Continual improvement* - Bid meaning:** Continually improve the suitability, adequacy and effectiveness of the QMS using performance, analysis, management review and other evidence.

Controls: improvement priorities; process owner review; objective changes; technology and competence development; standard transition; simplification.

Evidence: sustained performance trends; completed improvements; removed waste; updated objectives; improved customer feedback.

> **Failure pattern:** the organisation makes frequent changes without learning whether the system is better.

Audit prompts: How is improvement sustained? Which process became simpler? What evidence shows the QMS is more effective than one year ago?

Toolkit B - APMP-Aligned Lifecycle and ISO Control Map

APMP's public Winning Business Ecosystem describes the pursuit across pre-bid and capture, bid and proposal, post-bid and proposal, and implementation. The following map keeps that professional lifecycle intact while showing where ISO 9001 controls belong.

Stage 1 - Pre-bid and capture

***Opportunity identification* - APMP-aligned activity:** understand customer requirements, market, history, incumbents and likely opportunities.

ISO control: context, interested parties, customer communication, organisational knowledge, external information and process inputs.

When: continuously, before a formal notice and immediately when a new lead appears.

Owner: business development or market owner, with process oversight from the bid function.

Minimum records: opportunity source, customer, possible need, route, timing, value range, confidence, owner and next action.

> **Quality test:** can the opportunity be traced to a source, or is it a sales story?

***Qualification* - APMP-aligned activity:** decide bid or no-bid using return, win probability and risk, and secure leadership commitment.

ISO control: risk-based planning, leadership, review of requirements, resource adequacy, decision authority and retained evidence.

When: after initial triage, before material capture or bid spend, and again after material change.

Owner: opportunity owner proposes; authorised gate body decides.

Minimum records: criteria, rationale, sources, risks, resources, conditions, approval and re-gate trigger.

> **Quality test:** could a high total score be hiding a fatal zero?

***Strategic planning* - APMP-aligned activity:** develop win themes, competitive position, partners, resources and capture actions.

ISO control: design planning, organisational knowledge, external-provider control, objectives, change and documented information.

When: after qualification and through solicitation release.

Owner: capture lead, supported by solution, commercial, operations and leadership.

Minimum records: customer outcomes, sources, known/inferred/unknown, competitor position, solution concept, themes, partner status, actions and decisions.

> **Quality test:** which decision changed because of the capture work?

***Pre-solicitation readiness* - APMP-aligned activity:** assemble proposal, capture and subject-matter resources and prepare tools and support.

ISO control: competence, capacity, infrastructure, provider approval, document environment and planned change.

When: before expected release for strategic pursuits; immediately after gate for short routes.

Owner: capture and bid leads jointly.

Minimum records: resource plan, deputy cover, workspace, approved sources, initial schedule, evidence gaps and first forty-eight-hour plan.

> **Quality test:** are named people available when the process needs them, not merely during the month?

Stage 2 - Bid and proposal

***Solicitation review* - APMP-aligned activity:** analyse requirements, instructions, evaluation, deadlines and build the compliance matrix.

ISO control: customer requirements, external documents, contract review, change, traceability and operational planning.

When: immediately after receipt; baseline within the first one or two working days depending on complexity.

Owner: bid manager, with functional owners for technical, commercial, legal and security review.

Minimum records: document baseline, compliance matrix, kill sheet, clarification log, contract issues and updated gate.

> **Quality test:** can every material requirement be found from original source to response location?

***Bid planning* - APMP-aligned activity:** set milestones, roles, resources, internal dates and check-ins.

ISO control: operational planning, objectives, resources, responsibilities, communication, risk and acceptance criteria.

When: kick-off after initial requirement analysis; update after material change.

Owner: bid or proposal manager.

Minimum records: plan, schedule, role matrix, review strategy, escalation, risk, evidence plan, production and release route.

> **Quality test:** does the plan measure readiness or only dates?

***Proposal development* - APMP-aligned activity:** develop templates, content, price, reviews, compliance and responsiveness.

ISO control: design and development, controlled production, competence, knowledge, provider control, monitoring, traceability, change and nonconforming output.

When: from solution baseline to final content approval.

Owner: solution, commercial and proposal leads with answer owners.

Minimum records: solution inputs and baseline, price model, answer plans, evidence cards, controlled drafts, promise register, change log and technical approvals.

> **Quality test:** do solution, price, evidence and narrative describe the same offer?

***Colour-team and other reviews* - APMP-aligned activity:** use Pink, Red, Gold or equivalent reviews for iterative improvement.

ISO control: review, verification, validation, competent independent assessment, finding control, correction and release.

When: at defined maturity, early enough to change the relevant output.

Owner: review chair independent from the authoring task where practical.

Minimum records: purpose, entry criteria, reviewer brief, scores, findings, owners, closure and residual risk.

> **Quality test:** what decision is this review intended to support?

***Submission and follow-up* - APMP-aligned activity:** final formatting, quality checks, correct submission, receipt confirmation and clarification availability.

ISO control: release, preservation, traceability, customer communication, nonconforming output and records.

When: after content approval with protected contingency.

Owner: release authority and authorised uploader.

Minimum records: final files, approvals, manifest, release record, receipt, verification and incidents.

> **Quality test:** does the portal contain exactly the files that were authorised?

Stage 3 - Post-bid and proposal

***Evaluation support* - APMP-aligned activity:** monitor status and coordinate clarification or evaluation responses.

ISO control: customer communication, baseline control, change, release and documented information.

When: from submission until formal result and contract position are complete.

Owner: bid manager or designated pursuit owner.

Minimum records: customer request, impact assessment, response, approvals, changed commitments and receipt.

> **Quality test:** did a short clarification create an unpriced obligation?

***Negotiation* - APMP-aligned activity:** collaborate with legal, pricing and contracts, protect margin and respond to customer needs.

ISO control: requirements review, design change, commercial approval, authority, communication and operational planning.

When: whenever the process permits or requires negotiation, best-and-final offer or contract finalisation.

Owner: authorised negotiation lead with commercial and legal support.

Minimum records: objectives, boundaries, concessions, exchanges, notes, approvals, revised baseline and formal confirmation.

> **Quality test:** is each concession exchanged for understood value or simply given under pressure?

***Award or unsuccessful result* - APMP-aligned activity:** celebrate or debrief, analyse result and transition.

ISO control: customer perception, analysis, nonconformity, improvement, records and handover.

When: immediately on formal notice, followed by planned review when evidence is available.

Owner: pursuit owner, process owner and delivery owner for wins.

Minimum records: formal notice, result check, feedback, legal review where needed, transition or closure, learning and actions.

> **Quality test:** what did the outcome prove, and what did it not prove?

Stage 4 - Implementation and contract learning

***Project launch and mobilisation* - APMP-aligned activity:** deploy resources, align to the statement of work and begin planned delivery.

ISO control: operational planning, design outputs, release, provider control, competence, infrastructure, customer communication and change.

When: before contract start and through mobilisation acceptance.

Owner: mobilisation or delivery lead accepting tender commitments.

Minimum records: promise register, mobilisation plan, customer dependencies, resources, partner outputs, acceptance and open issues.

> **Quality test:** does the organisation on the page exist on day one?

***Contract administration and deliverables* - APMP-aligned activity:** manage terms, amendments, communication, reporting, invoicing, obligations and changes.

ISO control: controlled service provision, monitoring, nonconforming outputs, customer feedback, provider performance and documented information.

When: throughout delivery.

Owner: contract and operational owners.

Minimum records: performance, customer reviews, changes, issues, corrective actions, reporting and evidence.

> **Quality test:** which tender commitment is currently difficult to deliver, and what is being done?

***Closeout, lessons and future relationship* - APMP-aligned activity:** document lessons, analyse win or loss, archive records and maintain the relationship.

ISO control: performance evaluation, knowledge, retention, corrective action, improvement, context and future opportunity inputs.

When: at planned review points, contract close and before future pursuits.

Owner: contract owner and bid process owner.

Minimum records: performance summary, customer permission, evidence cards, lessons, corrective actions, archived obligations and future actions.

> **Quality test:** what current evidence did delivery create, and where can the next bid find it?

The integrated six-gate route - Gate 0 - Market and route relevance

Decision: is this market, framework, dynamic market or customer route worth organised attention?

ISO emphasis: context, interested parties, strategy, risk and resource.

APMP emphasis: opportunity identification and market research.

Gate 1 - Opportunity qualification

Decision: bid, conditional bid, partner, defer or no-bid.

ISO emphasis: requirements, risk, capability, capacity, authority and evidence.

APMP emphasis: bid/no-bid and leadership commitment.

Gate 2 - Strategy and solution commitment

Decision: approve customer strategy, win themes, solution direction, partner model and commercial boundaries.

ISO emphasis: design planning, provider control, resources and risk.

APMP emphasis: capture strategy and competitive positioning.

Gate 3 - Response readiness

Decision: authorise full development against an understood baseline and credible plan.

ISO emphasis: operational planning, requirements, competence, documented information and acceptance criteria.

APMP emphasis: solicitation review and bid planning.

Gate 4 - Release

Decision: authorise the final output for submission.

ISO emphasis: verification, validation, conformity, release and records.

APMP emphasis: final review, production, quality assurance and submission.

Gate 5 - Result and transition

Decision: mobilise, negotiate, challenge, learn, close or continue.

ISO emphasis: customer feedback, handover, nonconformity, improvement and knowledge.

APMP emphasis: evaluation, contract award, implementation and closeout.

Timing rules

- Put controls before the risk becomes irreversible.
- Put customer and market work before full proposal spend.
- Put operations before final solution commitment.
- Put commercial reconciliation before executive release.
- Put independent review before production.
- Put portal rehearsal before the last day.
- Put handover before the bid team disperses.
- Put learning where the next process decision can use it.

The lifecycle is not a straight line. Material change may move the pursuit backwards. Control the return rather than pretending it did not happen.

Toolkit C - The Working Process Pack

The tools below are specifications rather than decorative templates. Build them in the system the organisation already uses where possible. Each field should support a decision, control or record. Remove fields that have no purpose and add any required by customer, law, contract, risk or scale.

Tool 1 - QMS scope and process boundary - Purpose: state what the QMS covers and where end-to-end bid management sits.

Fields:

- legal entity and organisational unit;
- products and services;
- sites and geographical boundaries;
- supporting and outsourced processes;
- start and end of the bid process;
- relevant interested parties;
- applicable statutory, regulatory and customer requirements;
- any requirement considered not applicable and justification;
- approval and review date.

Example process boundary: from identification of a possible opportunity through qualification, capture, solicitation review, planning, solution and commercial development, writing, review, release, submission and post-submission activity to award handover or unsuccessful closure and learning.

> **Control note:** review when services, locations, ownership, certification requirements or organisational boundaries change.

Tool 2 - End-to-end process card - Purpose: describe how the process achieves intended results and interacts with other processes.

Fields:

- process name and owner;
- purpose and intended results;
- inputs and providers;
- stages and key decisions;
- outputs and recipients;
- entry and exit criteria;
- roles and authorities;
- resources and competence;
- systems and infrastructure;
- risks and opportunities;
- controls and methods;
- performance measures;

- maintained information;
- retained records;
- interactions with sales, finance, legal, operations, quality, procurement, HR, IT and contract management;
- change and improvement history.

Use: walk the card against a live bid at least annually and after material change. Revise where actual work and intended process differ.

Tool 3 - Opportunity gate record - Purpose: support and evidence a proportionate bid/no-bid decision.

Identity: customer, opportunity, route, lot, value range, term, dates, owner and source.

Triage: mandatory conditions, jurisdiction, portal, mobilisation, obvious conflicts, financial thresholds, certificates and fatal barriers.

Assessment dimensions: strategic fit; customer position; requirement fit; solution; evidence; competition; commercial case; capacity; delivery; risk and ethics.

For each dimension record score, minimum threshold, rationale, source and confidence.

Decision options: bid; conditional bid; partner; defer; no-bid.

Conditions: action, owner, due date and consequence if not met.

Authority: recommendation, decision, approver, date, override rationale and next re-gate trigger.

Review data: final result, actual bid cost, margin position, delivery outcome and whether the gate prediction was sound.

> **Control note:** never allow a total score to hide a zero against a mandatory threshold.

Tool 4 - Capture plan - Purpose: turn customer and market understanding into controlled strategic action.

Sections:

1. customer mission, outcomes and current situation;
2. relevant stakeholders and professional responsibilities;
3. route to market and decision constraints;
4. known, inferred and unknown requirements;
5. source register with date and confidence;
6. incumbent and credible competitors;
7. strengths, weaknesses, gaps and proof;
8. solution concepts and design assumptions;
9. commercial boundaries and value hypothesis;

10. partners and dependencies;
11. win themes using importance, difference, proof, delivery and traceability tests;
12. capture actions, owner, date and expected decision effect;
13. risks, opportunities and next gate.

> **Control note:** mark concepts as concept, baseline or approved offer. Reset the strategy when the formal solicitation contradicts capture assumptions.

Tool 5 - Document baseline and compliance matrix - Purpose: preserve the authoritative customer input and trace every material requirement.

Baseline record: document name, source, issue date, downloaded date, owner, original location, working location, version, status and superseded-by link.

Compliance entry:

- unique ID;
- exact source and reference;
- requirement summary;
- exact wording where necessary;
- type: instruction, participation, technical, commercial, contract, legal, pricing or clarification;
- mandatory or scored;
- response location;
- owner and contributor;
- evidence or attachment;
- dependency;
- status;
- verification and verifier;
- change history.

> **Control note:** create a separate kill-sheet view for requirements that can exclude, reject or materially invalidate the submission.

Tool 6 - Bid plan and campaign board - Purpose: plan and control the live response.

Plan content:

- objective and opportunity class;
- customer and win strategy;
- document baseline;
- milestones and protected contingency;
- gates and review purposes;
- roles, authorities and deputies;
- answer and schedule ownership;
- solution and pricing workstreams;
- evidence requests;
- partner inputs;

- risks, issues and assumptions;
- communication rules;
- change control;
- production, release and upload route;
- post-submission and handover plan.

Campaign-board columns: output, owner, maturity, due date, blocker, decision required, evidence, next action and status.

> **Control note:** measure milestone completion against defined readiness, not percentage of a document filled.

Tool 7 - Solution design record - Purpose: control customer-specific service design and its transfer into price, evidence, narrative and delivery.

Design inputs: requirements, laws, standards, customer outcomes, volumes, existing environment, user needs, risks, dependencies, commercial boundaries and lessons.

Plan: stages, responsibilities, interfaces, review, verification, validation and approval.

Solution outputs:

- service or product model;
- process and customer journey;
- people, assets and systems;
- mobilisation and transition;
- governance, reporting and measures;
- partner work packages;
- continuity and recovery;
- social value and sustainability;
- customer dependencies;
- assumptions and limitations;
- commercial input basis;
- evidence references.

Design controls: review decisions, verification results, validation scenarios, unresolved issues and approval.

Change: reason, impact, affected outputs, approval and closure.

> **Control note:** writers receive approved design outputs. They do not resolve open design questions silently in prose.

Tool 8 - Commercial model control sheet - Purpose: connect solution, cost, price, risk and approval.

Fields: pricing mechanism; currency and VAT treatment; volumes; cost sources; labour; non-labour; mobilisation; partners; overhead; margin; inflation; indexation;

contingency; payment timing; cash trough; sensitivity; service credits; liabilities; assumptions; exclusions; approval.

Reconciliation: list material narrative commitments and confirm where each is priced. List priced resources and confirm where they appear in solution and narrative.

Version control: model owner, formula protection, input source, review, approval, change history and released output.

> **Control note:** no narrative saving or enhancement should exist without a commercial treatment and owner.

Tool 9 - Evidence card - Purpose: allow responsible reuse of proof without losing context or limits.

Fields:

- evidence title and ID;
- claim supported;
- source and source owner;
- service, customer and context;
- result and method;
- measure definition, baseline, period, population and denominator;
- relevance and transfer limits;
- independent assurance;
- permission and confidentiality;
- approved quotation or wording where applicable;
- linked files;
- review date and expiry;
- current status;
- evidence owner.

> **Control note:** a case study may be current while one metric within it is expired. Control at the level of material claim.

Tool 10 - Answer plan and content brief - Purpose: define what the response must achieve before full drafting.

Fields: question and score; verbs and components; evaluation criteria; customer outcome; direct answer; method; owner; timing; control; risk and recovery; evidence; measure; differentiator; price link; commitments; word allocation; content owner; contributors; reviewers; prohibited or unapproved claims; open gaps.

Content brief for specialists:

- decision required;
- facts and examples needed;
- operational scenario;
- measure and evidence;

- dependencies and limitations;
- deadline and approval route.

> **Control note:** the answer plan changes under controlled impact when requirements or design change.

Tool 11 - Review record - Purpose: provide objective, traceable review and closure.

Header: review purpose, maturity, date, scope, criteria, chair, reviewers and independence or competence notes.

Finding fields:

- answer or output;
- evaluator conclusion or defect;
- evidence in text;
- requirement or criterion;
- severity: critical, major, minor or observation;
- action required;
- owner and date;
- affected outputs;
- verifier;
- closure evidence;
- residual risk and acceptance.

Review output: forecast score, top strengths, top unresolved doubts, decision to proceed, repeat or stop.

> **Control note:** reviewers score before editing. Critical and major findings require verified closure or formal risk acceptance.

Tool 12 - Release and submission record - Purpose: authorise and prove release of the final bid.

Release criteria: baseline current; compliance verified; mandatory schedules complete; critical findings closed; price approved; contract position approved; commitments authorised; final files inspected; accessibility and format checked; portal rehearsed; manifest complete; deputy and contingency available.

Approval fields: release decision, exceptions, residual risk, approver, date and time.

Submission manifest: lot, file, format, size, approved source, checksum where used, upload status and verifier.

Receipt: portal status, receipt reference, screenshots, date, time, uploader, second checker and any incident.

> **Control note:** the release record refers to exact files. It is not a generic sign-off completed before production.

Tool 13 - Promise and handover register - Purpose: transfer tender commitments into mobilisation and contract control.

Fields:

- promise ID;
- exact commitment;
- source answer or clarification;
- customer requirement;
- delivery owner;
- start date or milestone;
- measure and evidence;
- resource and cost;
- dependency;
- partner involvement;
- contract location where applicable;
- mobilisation action;
- acceptance status;
- risk and escalation;
- future evidence opportunity.

Handover acceptance: delivery confirms receipt, understanding, resource and open actions. Disputed commitments are escalated before contract start.

> **Control note:** extract promises during development and confirm again from the submitted baseline.

Tool 14 - Nonconformity and corrective-action record - Purpose: correct failure and address cause.

Fields:

- issue and requirement not met;
- date, source and opportunity;
- immediate consequence;
- containment;
- correction;
- customer communication;
- similar-risk assessment;
- cause analysis and evidence;
- corrective action;
- owner, resource and date;
- affected documents, training, risks or objectives;
- effectiveness method and review date;
- result and closure authority.

> **Control note:** 'human error' is not a sufficient cause where the system made the error likely or difficult to detect.

Tool 15 - KPI definition card - Purpose: ensure measures are reliable and decision-useful.

Fields: name; purpose; definition; numerator; denominator; inclusion and exclusion; source; owner; frequency; target; segmentation; limitations; data-quality check; action trigger; reporting route.

Example: material compliance defects found after evaluator review per decided competitive submission, segmented by opportunity class and source process.

> **Control note:** review unintended behaviour created by targets.

Tool 16 - Internal audit plan and report - Plan: objective; scope; criteria; process; risk basis; sample; auditor; competence and independence; methods; timetable; reporting and follow-up.

Evidence record: people interviewed; records sampled; observations; process trail and objective evidence.

Finding: requirement; evidence; nonconformity or observation; severity; owner and due date.

Report: conclusion on conformity and effectiveness; strengths; findings; systemic themes; follow-up.

> **Control note:** sample wins, losses, no-bids and live work. Audit interfaces and intended results, not only document presence.

Tool 17 - Management review pack - Purpose: enable top-management decisions on suitability, adequacy, effectiveness and strategic alignment.

Inputs: previous actions; context and interested parties; customer feedback; objectives; process performance; conformity; nonconformity and corrective action; audit; provider performance; resource adequacy; risk and opportunity; improvement; scope and standards change.

Outputs: decisions on QMS changes; objectives; processes; products and services; resources; improvement; certification and transition.

Record: decision, rationale, owner, due date, resource and follow-up route.

> **Control note:** present trends and decisions in business language. A management review that generates no action may be valid only if evidence genuinely supports no change.

Toolkit D - Process Audit Question Bank

An audit question is useful when it follows work far enough to expose whether the process held together. It is less useful when it invites a rehearsed answer.

"Do you have a qualification process?" will usually receive a confident yes. A better route is to select one recent opportunity, begin with the original notice and follow the decision through the records. Who found it? Which version of the documents was reviewed? What made the opportunity attractive? Which requirement could have stopped the bid? Who accepted the commercial exposure? What changed after clarification? The trail either exists or it does not.

Use this question bank as a set of routes, not as a script to be read mechanically. The auditor should vary the order, ask for evidence and follow contradictions. One answer may make the next ten questions unnecessary. Another may open a part of the system nobody expected to examine that morning.

Trail 1 - Context, scope and leadership
Start with the reason the bid QMS exists.

1. What products, services, sectors, jurisdictions and pursuit activities sit inside the defined scope?
2. Which activities are performed elsewhere in the organisation but materially affect bid quality?
3. What was excluded from the scope, and what is the evidence that the exclusion does not weaken conformity or customer satisfaction?
4. Which internal issue has altered the bid process during the past year?
5. Which external issue has done the same?
6. How has the organisation decided whether climate change is relevant to the QMS and its interested parties?
7. Which interested parties can create or alter requirements for the pursuit process?
8. What does each of those parties reasonably require from the system?
9. Who reviews changes in procurement law, customer buying practice, technology, markets and organisational capacity?
10. Show one decision made because context changed. What happened next?
11. What does top management do that would stop if leadership commitment were removed?
12. Which quality objective matters most to the commercial strategy this year?
13. What baseline supports that objective?
14. Who has authority to stop a pursuit, reject a commitment or delay release?
15. Show an occasion when that authority was used.
16. How does leadership know whether the QMS is helping the business rather than producing internal paperwork?
17. What resources were added or removed after a management review?

18. Which conflict between revenue pressure and quality control has been resolved recently?
19. How are responsibilities understood by people outside the bid team?
20. What evidence would show that customer focus survives deadline pressure?

Look for decisions, not slogans. A framed policy and a quarterly meeting invite are not enough. Leadership becomes visible when a weak opportunity is declined, a resource conflict is resolved, an unverified claim is removed or an internal deadline is protected despite pressure from somebody senior.

Trail 2 - Opportunity identification and qualification
Select a win, a loss and a no-bid where possible. The contrast is useful.

1. How did the opportunity enter the pipeline?
2. Was the source authoritative, current and complete?
3. Who performed the first triage, and within what expected time?
4. Which mandatory participation or eligibility condition was tested first?
5. What customer need was understood at the point of qualification?
6. Which part was assumption rather than evidence?
7. How were capability, capacity, competition, relationship, commercial return and strategic fit considered separately?
8. What minimum thresholds applied?
9. Why did this opportunity pass or fail them?
10. Who attended the gate, and whose absence mattered?
11. What evidence sat beside the qualification ratings?
12. Was bid effort included in the commercial decision?
13. How was delivery capacity tested against other live commitments?
14. Which risk could have turned the opportunity into a no-bid later?
15. Was a requalification trigger defined?
16. Show the effect of a clarification, scope change or pricing discovery on the decision.
17. If an executive overrode the gate, where is the rationale and risk acceptance?
18. Did the final bid resemble the opportunity that originally passed the gate?
19. What did the organisation learn from the no-bid?
20. Does the weighted pipeline distinguish published ceilings from probable and addressable revenue?

A common weakness is a qualification score that looks precise but conceals one fatal zero. An opportunity can receive seventy-two per cent overall while failing an insurance threshold, lacking a delivery partner or requiring cash the business does not possess. Audit the dimensions and red lines, not only the final percentage.

Trail 3 - Capture and customer insight
Choose a pursuit where capture activity occurred before the formal tender.

1. What was the capture objective?
2. Which information was obtained from public, permissioned or otherwise lawful sources?

3. How was fact separated from inference?
4. What did the team understand about the customer's outcome, operating environment and likely concerns?
5. Which stakeholder roles were mapped and why did each matter?
6. Were contacts and engagement consistent with procurement fairness and organisational policy?
7. What changed in the offer because of capture work?
8. Which capture action failed to produce useful information?
9. How were competitor and incumbent positions analysed without invention?
10. What was the evidence for each proposed win theme?
11. Did the strategy state choices and trade-offs, or merely list strengths?
12. Who owned unresolved intelligence gaps?
13. When did the team decide it knew enough to proceed?
14. How did capture findings enter the compliance matrix, solution design and pricing model?
15. Which customer assumption was later disproved by the solicitation?
16. Was that change controlled?
17. How was confidential or personal information protected?
18. What capture knowledge remains reusable and what is opportunity-specific?
19. Did the team review capture effectiveness after the result?
20. What would it do differently before the next notice?

Capture is not measured by the number of conversations. It is measured by better decisions. A twenty-minute public supplier briefing that changes the mobilisation model may matter more than six months of polite account contact.

Trail 4 - Tender intake, requirements and contract review
Begin with the native files, not the compliance matrix.

1. Who received the solicitation and recorded the authoritative source?
2. Was the complete file set preserved in its original form?
3. How were issue date, deadline, clarification deadline, lots and procedure confirmed?
4. Which document hierarchy applies when instructions conflict?
5. How were amendments and clarification answers baselined?
6. Can the team prove which version governed the submission?
7. How were requirements extracted from notices, instructions, questions, schedules, specifications, contract terms and portal fields?
8. Does each compliance entry retain exact source and location?
9. Which requirements are pass-or-fail, scored, contractual or informational?
10. What method prevents one instruction from being counted as several different requirements without control?
11. Who reviewed legal, financial, technical and operational obligations?
12. Which requirement could not initially be met?
13. How was the issue clarified, mitigated, departed from or escalated?
14. What was the effect on scope, price and delivery?

15. Did the organisation accept any requirement it had not previously delivered?
16. Who approved that acceptance?
17. How were word limits, file formats, signatures and portal constraints treated?
18. Which clarification answer changed another part of the bid?
19. How was that downstream impact located and closed?
20. What evidence shows that the requirements review was complete before detailed drafting accelerated?

The matrix is not proof by itself. Compare it with the source documents. An auditor should be able to select an awkward clause from the contract and trace it into the matrix, solution, price, response and final promise register.

Trail 5 - Solution, pricing and evidence
Select one important promise from the submitted bid and follow it backwards.

1. What requirement caused this part of the solution to exist?
2. Which design input described the need, constraint, risk and acceptance condition?
3. What alternatives were considered?
4. Why was this design selected?
5. Who took part in the design review?
6. Which operational specialist challenged it?
7. How was the difficult day, failure case or peak volume tested?
8. What was verified against documented requirements?
9. What was validated against intended customer use?
10. Which assumptions remain in the design?
11. Where are they reflected in the price?
12. How did labour, technology, provider, mobilisation, contingency and management effort enter the model?
13. Can a priced resource be traced into the method statement?
14. Can a promised enhancement be traced into cost and capacity?
15. Which evidence supports the claimed result?
16. Is the evidence current, comparable, permissioned and defined?
17. What limitation was disclosed?
18. How did the case study demonstrate transfer rather than prestige?
19. Which design change occurred after pricing or review, and how was its impact assessed?
20. Who released the design as sufficiently stable for final writing and production?

A surprisingly useful audit question is: "What would fail first if demand doubled?" The answer often reveals whether the solution was designed, priced and tested as one thing or developed in three separate rooms.

Trail 6 - Writing, review and release
Choose one scored response with several contributors.

1. What was the direct answer intended to prove?
2. Which content brief or answer plan governed the draft?

3. Were question components and scoring opportunities visible before writing?
4. Which controlled sources could the writer use?
5. Who owned factual, technical and commercial content?
6. How were contributions incorporated without losing version control?
7. What did "Pink", "Red", "Gold" or another review name mean in this organisation?
8. Were entry criteria satisfied before each review?
9. Did reviewers score evaluator confidence before editing language?
10. How were findings classified and assigned?
11. Who verified closure?
12. Which comment was rejected, and why?
13. How were numbers, names, dates and commitments checked across documents?
14. How was AI use controlled, verified and disclosed where required?
15. What did the read-aloud or plain-language review change?
16. Who checked production, accessibility, file integrity and final cross-references?
17. Were release criteria defined before the last hour?
18. Which residual exception was accepted?
19. Who had release authority?
20. Do the released files exactly match the files later uploaded?

A review record full of comments is not evidence of an effective review. The stronger evidence is that the important defects were found early, correctly classified, closed by accountable owners and prevented from returning elsewhere.

Trail 7 - Submission, post-bid activity and handover
Follow the submission from internal freeze to delivery acceptance.

1. What was the internal deadline?
2. Who could release contingency, and was that authority used?
3. Was portal access and upload behaviour rehearsed?
4. Did the submission manifest identify every required file and field?
5. How were checksums or other integrity controls used where proportionate?
6. Who uploaded and who independently verified?
7. What receipt or portal evidence was retained?
8. How would the team respond to an outage or rejected file?
9. Were post-submission clarifications controlled against the submitted baseline?
10. Who approved any new commitment made during clarification, presentation or negotiation?
11. How were changes reflected in price, contract and delivery planning?
12. What happened when the result arrived?
13. Was the controlled submission archived?
14. Were promises extracted before mobilisation?
15. Did delivery confirm understanding, ownership, resource and timing?
16. Which promise was disputed during handover?
17. How was it resolved?

18. Did customer feedback and assessment information enter the improvement process?
19. What contract-performance evidence will return to future bids?
20. Can the organisation show that the team on the page existed after award?

Do not audit handover by asking whether a meeting occurred. Take a material tender promise and ask the delivery owner to explain it. If they first see the wording during the audit, the handover was ceremonial.

Trail 8 - Resources, providers, knowledge and technology
Select a role, an external provider and one important system.

1. How was the required competence for the role determined?
2. What evidence shows the individual can perform the work?
3. How were competence gaps addressed?
4. Was action evaluated for effectiveness?
5. What should the person know about policy, objectives, process consequences and their authority?
6. Which working-condition or workload issue affects bid quality?
7. How is infrastructure maintained and access controlled?
8. What happens if the collaboration platform, CRM or evidence system becomes unavailable?
9. Which external providers can affect conformity?
10. How were they selected, briefed, monitored and re-evaluated?
11. Do provider deliverables have acceptance criteria?
12. How are partner commitments confirmed before use?
13. Which organisational knowledge would be lost if one person left tomorrow?
14. How is that knowledge captured at the point of work?
15. Who owns review dates and expiry for reusable evidence?
16. What data may enter approved AI systems?
17. How are prompts, retrieved sources and generated claims controlled where proportionate?
18. Who remains accountable for the submitted output?
19. What evidence shows that automation improved control rather than merely speed?
20. Which technology risk is accepted, reduced, transferred or avoided?

The presence of an enterprise licence is not an AI control. The audit should reach data classification, intended use, source provenance, human review, output acceptance and incident response.

Trail 9 - Measurement, internal audit and management review
Choose one reported KPI and follow it to a decision.

1. What question is the measure intended to answer?
2. Is the definition stable and understood?
3. What are the numerator, denominator, period, source and exclusions?
4. Who checks data quality?

5. Does the measure distinguish opportunity classes where needed?
6. What target or trigger applies?
7. What behaviour could the measure unintentionally encourage?
8. What trend has management identified?
9. What decision followed?
10. Was the effect of that decision later reviewed?
11. How is customer perception obtained beyond win rate?
12. Does the internal audit programme follow process risk and past performance?
13. Are auditors sufficiently competent and independent?
14. Does sampling include wins, losses, no-bids and live work?
15. Are interfaces audited?
16. Are findings written against criteria and objective evidence?
17. Who controls follow-up and closure?
18. Does management review receive the required and useful inputs?
19. What resources or process changes were decided?
20. How does leadership know those actions were completed and effective?

If the management-review minutes contain only presentations, the review may have been a reporting meeting. Look for choices: stop, start, fund, change, investigate, accept, escalate or retain.

Trail 10 - Nonconformity, corrective action and improvement
Select one event that mattered and one near miss.

1. What requirement was not met?
2. How was the output controlled or contained?
3. What correction was made?
4. Was the customer affected or informed?
5. Were similar processes, bids or records checked?
6. What evidence informed the cause analysis?
7. Did the analysis stop at "human error"?
8. Which conditions made the error possible, likely or difficult to detect?
9. What corrective action addressed those causes?
10. Did the action create a change to process, documented information, competence, technology, objectives or risk?
11. Who owned completion?
12. How was effectiveness defined before closure?
13. Was sufficient time or opportunity allowed to test it?
14. Did the issue recur?
15. What happened to related evidence and lessons?
16. Was the event proportionately escalated?
17. Did a win or loss review reveal a systemic problem?
18. How was delivery performance connected back to bidding?
19. Which improvement has simplified work rather than added control?
20. What has the organisation deliberately stopped doing?

Improvement is not measured by the number of actions opened. Sometimes the best improvement removes a duplicate spreadsheet, joins two approvals or makes one source authoritative. The QMS should become easier to use as it becomes more mature.

Toolkit E - Realistic Scenario Playbook

The following scenarios are deliberately ordinary. They are not spectacular frauds or disasters. Most quality failures begin as plausible decisions made by busy people who think they are helping.

Each scenario uses four time horizons: **now**, **before the next irreversible decision**, **before submission or delivery**, and **after the result**. That sequence helps the team contain the immediate issue without losing the opportunity to improve the system.

Scenario 1 - The chief executive has already announced the framework value

At 09:03, an award email confirms admission to a framework with a published ceiling of £180 million. By 09:26, the chief executive has told the company that it has won £180 million of work. Marketing is preparing a press release. Finance has placed four per cent of the ceiling into the forecast because there are twenty-five suppliers.

Now: stop the forecast entry without turning the correction into public humiliation. Preserve the award notice and obtain the full buyer guide, lot description, eligible-user list and call-off rules. Record the distinction between framework ceiling, addressable value and qualified pipeline.

Before the next irreversible decision: hold a short activation gate. Confirm who owns the framework, what resource will operate it, how buyers may award work and what minimum result justifies the effort. Correct internal language before it reaches customers or lenders.

Before the first call-off: prepare the route card, buyer map, current evidence, pricing controls, mini-competition workspace and promise-handover route. Use the framework value only as market context.

After ninety days: review eligible buyers mapped, verified needs, competitions, no-bids, call-offs, margin and activation cost. Do not judge the vehicle by email opens. Do not protect it merely because the admission bid was expensive.

Records: opportunity gate, framework activation plan, account map, management decision and KPI definitions.

Audit question: which published figure is being represented as revenue, and what evidence permits that representation?

Scenario 2 - A late clarification changes the volume assumption
On Tuesday afternoon, eight working days before submission, the authority confirms that the monthly service volume is likely to be twice the quantity used in the pricing model. The clarification is only six lines long. The solution lead says the method can absorb the increase. Finance is less certain. Three draft answers already quote the original figure.

Now: baseline the clarification and issue an impact alert. Do not rely on people noticing the portal message. Assign one owner to assess requirements, solution, capacity, price, evidence, risks, partners and affected answers.

Before the next irreversible decision: re-run the qualification and commercial gate. Doubling volume may alter staffing, working capital, technology limits, subcontractor capacity and minimum margin. Record whether the pursuit remains acceptable and who accepts residual exposure.

Before submission: update the compliance matrix, design inputs, financial model, answer plan, programme, resource plan and cross-document figures. Run a bounded inconsistency check. Reapprove affected commitments without reopening unrelated prose.

After the result: examine whether the change-control route located every dependency and how long closure took. Correct the map where it did not.

Records: clarification log, impact assessment, revised gate, design change record, model approval and closure evidence.

What not to do: ask every writer to "update their section" and hope that the same interpretation appears throughout.

Scenario 3 - The managing director overrides a no-bid
A regional lot fails the agreed capacity threshold. The operations director has identified a twelve-week recruitment lead time, while mobilisation allows eight. The opportunity is prestigious and the managing director instructs the team to proceed because "we will solve it if we win".

Now: record the failed threshold, evidence and stated override. Do not quietly change the score to green. Ask which authority permits the exception and what additional control is required.

Before detailed writing: run a focused risk hearing. Test alternative scope, partner capacity, phased mobilisation, contingent recruitment, cost and contractual consequences. If no credible route exists, place the decision back before top management with the customer consequence made explicit.

Before submission: if the bid proceeds, the approved mobilisation model, price, dependencies, trigger dates and recovery plan must be visible. The override owner signs the residual risk. Delivery accepts the promise before release.

> **After the result:** a win does not prove the override was wise. Compare forecast with mobilisation reality. A loss does not prove it was wrong. Review decision quality against the evidence available at the time.

Records: gate record, override rationale, risk acceptance, resource plan and promise register.

> **Audit question:** which control changed because the normal threshold was overridden?

Scenario 4 - The subcontractor cannot provide the promised evidence
The solution depends on a specialist data-destruction provider. A draft response states that all destruction sites hold a named certification and that certificates will be supplied on request. Two days before Red review, the provider confirms that one proposed site is awaiting renewal and another is outside the intended scope.

> **Now:** mark the claim as nonconforming and stop reuse. Confirm the actual provider scope, site status and delivery dependency. Do not edit "all sites" to "our sites" and move on.
>
> **Before Red review:** decide whether to change provider, remove the site, alter the solution, seek alternative evidence or qualify the commitment through the permitted route. Assess geography, capacity, price, mobilisation and customer risk.
>
> **Before release:** obtain permissioned, current evidence and verify that the provider's answer matches the prime's submission. Update due diligence, work package, price and promise register.
>
> **After the result:** review provider selection and evidence-expiry controls. The problem may not be a late certificate; it may be that the organisation promised a provider control before confirming it.

Records: provider evaluation, evidence card, design change, external-provider control and approved claim.

> **What not to do:** place the certificate in an appendix without checking which legal entity, site, service and period it covers.

Scenario 5 - The AI assistant invents a performance figure
A writer asks an approved generative-AI tool to strengthen a mobilisation answer using the evidence library. The draft states that the organisation has completed ninety-seven per cent of comparable mobilisations on time. Nobody recognises the figure, but it sounds plausible and survives an initial read because the paragraph is fluent.

> **Now:** quarantine the claim and identify every place it may have propagated. Review the prompt, retrieved material, output and user actions. Treat it as a near miss if it has not left the controlled environment.

> **Before the next review:** replace the unsupported figure with verified evidence or remove it. Ask why the workflow allowed generated assertions to appear without source markers. Do not solve the event by telling people to "be more careful".
>
> **Before submission:** run entity and number checks across answers, summaries, visuals and schedules. Require accountable owners to attest to material facts and commitments. Confirm any opportunity-specific AI disclosure.
>
> **After the result:** examine retrieval design, prompt pattern, user competence and acceptance controls. Test corrective action with representative tasks. A warning banner is not effective if users can still paste untraceable claims into controlled drafts.

Records: AI use register, incident or near-miss record, corrected draft, source evidence and effectiveness test.

> **Audit question:** can the author explain where every material generated claim came from without asking the model?

Scenario 6 - The subject expert and writer disagree
A clinical subject expert says the draft overstates what the proposed service can achieve. The lead writer argues that the sentence is needed to sound confident and that the expert is "too operational". The review is tomorrow morning. Both are respected and tired.

> **Now:** return to the requirement, approved proposition and evidence. The disagreement is not primarily about style. Identify whether the disputed wording is a measured result, modelled outcome, target or aspiration.

Before review: give content authority to the accountable expert for technical truth and to the bid lead for response strategy and structure. If the desired claim exceeds approved evidence, remove or qualify it. Record a material decision where necessary.

> **Before submission:** ensure the final language states actor, mechanism, timing, measure, boundary and consequence. Extract the commitment. Ask delivery whether it can own the sentence on Monday morning.
>
> **After the result:** review whether role authority was clear. If similar disputes recur, improve content briefs and controlled vocabulary rather than relying on personalities.

Records: answer plan, content approval, decision log and promise register.

> **What not to do:** compromise by inserting "we aim to" without deciding whether the tender requires a commitment.

Scenario 7 - Red review changes the price narrative
Red reviewers conclude that the resilience model is weak. The solution team adds a standby supervisor and weekend cover. The revised answer is stronger. The financial model remains unchanged because pricing approval closed three days ago.

> **Now:** treat the review finding as a design change, not an editorial improvement. Identify resources, rates, assumptions, management time, margin and partner effects.

Before closure: finance and operations either price and approve the enhancement or the response removes it. Reviewers do not close the finding merely because the paragraph now sounds credible.

> **Before release:** compare material commitments against the model and resource plan. Run the value ledger: requirement, benefit, mechanism, cost, evidence and owner. Confirm that the final price narrative and schedule tell the same truth.
>
> **After the result:** track late review findings that caused commercial rework. The objective is not to stop useful challenge; it is to bring design review earlier where possible.

Records: review finding, design change, model version, commercial approval and release record.

> **Audit question:** which words added after price freeze created cost, and where were they approved?

Scenario 8 - The portal stops responding forty-five minutes before deadline
The team planned to submit at 11:15 for a noon deadline. At 11:18, the portal begins timing out. Two files appear uploaded and three do not. The support line is busy. The final pack exists, but one director asks whether a smaller PDF should be produced immediately.

> **Now:** follow the rehearsed contingency route. Preserve screenshots and times. Confirm whether the portal has saved any files, contact support through the stated channels and prevent uncontrolled production changes.

Before making a new file: compare the proposed change with approved release criteria. A lower-resolution file may solve size while damaging legibility or creating a different baseline. Use only a pre-approved contingency version if one exists, or obtain controlled emergency approval.

Before the deadline: keep one person on upload, one on evidence and support communication, and one with authority to decide. Record every action. Do not let five people refresh the portal from different accounts.

> **Afterwards:** retain the receipt, incident record and communications. If submission succeeds, still review the contingency. If it fails, separate factual reconstruction, contractual or legal advice and process improvement.

Records: submission manifest, screenshots, support log, incident timeline, release exception and receipt.

> **What not to do:** continue drafting until 11:45 because "the portal is down anyway".

Scenario 9 - The contract is won but delivery rejects two promises
The award arrives on Friday afternoon. On Monday, the mobilisation manager reads the submitted service levels and says two cannot be delivered with the approved headcount. The bid team believed operations had signed off. Operations approved an earlier version.

> **Now:** compare the submitted baseline, approval record, financial model and contract. Identify the exact commitments, customer exposure and earliest decision required. Escalate before mobilisation turns the discrepancy into silent underperformance.
>
> **Before customer-facing plans are finalised:** decide whether resources can be added, the design corrected within contractual routes or the issue discussed formally. Do not ask delivery to "do its best" around an obligation nobody priced.
>
> **Before service starts:** assign owners, measures, resources, dependencies and escalation for every material promise. Confirm handover acceptance against the submitted version, not a slide deck.
>
> **After stabilisation:** investigate version and approval control. The corrective action may involve content-owner attestation, promise extraction before release and a mandatory submitted-baseline review at handover.

Records: promise register, approval comparison, nonconformity, mobilisation decision and corrective action.

> **Audit question:** which exact document did operations approve, and how was that identity preserved?

Scenario 10 - Loss feedback says the evidence was insufficient
The team loses a competition by three quality points. The assessment says the mobilisation approach was credible but lacked evidence that the proposed controls had worked at comparable scale. The sales director says the buyer simply preferred the incumbent.

> **Now:** separate recorded feedback from speculation. Map the assessment to the answer plan, review predictions and submitted evidence. Identify what conclusion the evaluator could safely reach.

Before the next similar bid: create an evidence debt record. Decide whether existing data can be reanalysed, whether a customer reference can be permissioned, whether a rehearsal can generate evidence or whether the future claim must be narrower.

At the next management review: examine whether the gap is isolated or strategic. If comparable mobilisation is a recurring criterion, operational data collection may deserve investment.

After evidence is created: test its transferability, definition, sample, period and limitations. Do not replace one vague case study with a larger vague case study.

Records: debrief analysis, evidence backlog, improvement decision, evidence card and future review result.

What not to do: record "need stronger evidence" as the complete lesson.

Scenario 11 - The internal audit finds a process nobody follows
Three weeks before the certification audit, an internal auditor samples five bids. The documented procedure requires Pink, Red and Gold reviews. Two low-risk bids used one combined review. One urgent mini-competition used no named colour review but did complete compliance, solution, commercial and release checks. Staff say the written process is unrealistic.

Now: do not force retrospective colour-team records. Establish the actual requirement behind the procedure: what review purposes and evidence were necessary for each opportunity class?

Before certification: decide whether people failed to follow a suitable process or the documented process failed to describe controlled practice. Correct genuine missing reviews. Revise the procedure where proportionate routes were intended but not defined. Retain evidence of evaluation and approval.

Before Stage 2: sample the revised approach in live work. Verify entry criteria, review purpose, competence, findings, closure and release. Brief people on the change.

After certification: continue auditing opportunity classes. Certification pressure should not turn colour names into compulsory theatre.

Records: audit finding, cause analysis, revised process, communication, live test and effectiveness review.

Audit question: which risk or decision does each review control, regardless of its name?

Scenario 12 - Climate-related requirements appear in a familiar sector
A facilities-management bidder has historically treated climate issues as a social-value paragraph. A new authority requires credible service continuity during heat events, supplier emissions data and a transition plan for equipment. The QMS context review states only that climate change is relevant "where required by the customer".

Now: review the external issue, interested-party requirements and operational consequences. Separate customer scoring, contract obligations, business-continuity risk and broader organisational commitments.

Before solution freeze: obtain competent input. Test equipment performance, workforce exposure, provider data, logistics, contingency and costs. State boundaries where data or control is limited.

> **Before submission:** link the climate-related requirements into the compliance matrix, design inputs, risk controls, provider requirements, measures and evidence. Avoid a detached green page that contradicts operations.
>
> **At management review:** decide whether climate-related context now changes QMS risks, objectives, resources, provider evaluation or knowledge needs beyond this single bid.

Records: context review, interested-party analysis, design record, provider criteria, measures and management decision.

> **What not to do:** insert a net-zero aspiration into the tender without an owner, baseline, pathway or price.

Scenario 13 - The bid team is asked to submit a polished first draft tomorrow

The tender arrived this morning. A director has promised the board a complete first draft by 10:00 tomorrow because AI can now "do the writing overnight". The documents contain twelve scored questions, four schedules, a contract and a pricing workbook. No qualification or requirements review has occurred.

> **Now:** redefine the deliverable. Tomorrow's useful output is a controlled baseline, kill sheet, qualification recommendation, compliance matrix shell, clarification list, answer plans and a resource decision. Calling that package a first draft creates less excitement, which is one of its advantages.

Before detailed prose: review requirements, contract exposure, solution inputs, evidence and price mechanism. Decide where AI can assist extraction and comparison under approved controls. Keep the native documents authoritative.

> **Before the first writing review:** require direct-answer positions, content owners, sources, gaps and commitments. A fluent answer with an unresolved delivery model is not ahead of schedule.
>
> **After the campaign:** compare predicted time saved with actual rework, defects and decisions. Automation should be evaluated through readiness and quality, not word count.

Records: triage record, plan, AI use record, compliance baseline and review findings.

> **Audit question:** which uncertainty was resolved by the overnight output?

Scenario 14 - One person holds the entire process
A small consultancy has one bid manager who finds opportunities, qualifies them, writes responses, controls files, models price, submits and stores evidence. The process works while she is present. She becomes ill six days before a major deadline. Nobody else knows the portal credentials or which pricing workbook is current.

Now: identify irreversible decisions, access, deadlines, authoritative files and customer communications. Appoint temporary authorities. Preserve the current baseline before attempting to accelerate.

Before submission: separate essential controls among available people: requirement verification, commercial approval, factual ownership, production and upload. Do not remove independence merely because the team is small; use a director, delivery lead or competent external reviewer where appropriate.

After the campaign: map single points of failure. Create deputies, access arrangements, process cards, controlled records and a rehearsal. Scale the solution to the business; do not build a bureaucracy designed for fifty people.

At management review: decide which knowledge must be organisational and which can remain specialist. Fund cover for the former.

Records: continuity plan, authority matrix, access control, process card and rehearsal result.

What not to do: praise the bid manager's heroism and keep the same operating model.

Toolkit F - Ninety-Day Implementation Calendar

This calendar assumes that the organisation has decided to build a practical ISO 9001 QMS around its pursuit lifecycle. It is not a promise of certification in ninety days. Existing maturity, scope, evidence, audit availability and certification-body timing differ. The purpose is to establish a working system quickly enough that real use can expose what still needs attention.

Use one accountable implementation lead. Give that person access to top management and process owners. They should coordinate the build, not become the owner of every process.

> **Week 1 - Decide why and where - Leadership work:** agree the business case, intended outcomes, scope boundary, resources and implementation authority.

Process work: identify the products, services, jurisdictions and pursuit activities in scope. List interfaces with sales, operations, finance, legal, technology, HR, marketing and contract management.

Evidence to retain: implementation charter, initial scope, leadership decision and resource commitment.

> **Live-work test:** select one current opportunity to act as the proving ground. Avoid choosing only the cleanest bid.
>
> **Friday question:** what should become easier, safer or more predictable because this QMS exists?

> **Week 2 - Understand context and interested parties -** Review strategy, market, procurement regimes, customer types, technology, capacity, regulatory exposure, provider dependence and climate-related relevance. Identify interested parties whose requirements affect the QMS.

Do not create a list of generic issues. Record consequence, owner, monitoring route and any action. Link material issues to scope, risks, objectives or processes.

Evidence to retain: context register, interested-party register, climate relevance decision and monitoring responsibilities.

> **Live-work test:** ask whether the selected pursuit reveals an issue absent from the workshop.

> **Week 3 - Map the end-to-end process -** Map opportunity identification, triage, qualification, capture, tender intake, requirements, planning, design, pricing, evidence, writing, review, release, submission, post-bid activity, handover and learning. Add support and management processes.

For each process, define purpose, inputs, outputs, sequence, owner, criteria, controls, resources, competence, risks, measures and records. Pay attention to handovers.

Evidence to retain: process architecture, process cards and interface map.

> **Live-work test:** walk one requirement from notice to eventual delivery owner.

> **Week 4 - Establish leadership controls -** Approve a usable quality policy. Set a small number of measurable objectives. Confirm process ownership, content authority, commercial authority, release authority, stop-work authority and escalation.

Create a monthly bid-quality review and a management-review route. Leadership should be able to see opportunity risk, process performance, customer feedback, resource collisions and improvement needs without receiving a hundred-page pack.

Evidence to retain: policy, objectives, authority matrix, meeting terms and first decisions.

> **Live-work test:** use the authority matrix when an actual disagreement occurs.

> **Week 5 - Build opportunity and capture controls -** Implement the opportunity record, first triage, qualification gate, requalification triggers, override route and no-bid record. Add a capture plan for opportunities that need pre-tender work.

Define proportionality. A low-risk quotation may use a short gate. A strategic, regulated or commercially exposed pursuit needs deeper evidence and leadership attention.

Evidence to retain: decided opportunities, no-bids, overrides, capture actions and strategy decisions.

> **Live-work test:** compare one emotional pipeline rating with the evidence supporting it.

> **Week 6 - Control tender intake and requirements -** Create the authoritative file baseline, amendment route, compliance matrix, kill sheet, contract review and clarification log. Define how changes propagate.

Train the team using native tender documents. Automated extraction may assist, but humans reconcile the output against source material.

Evidence to retain: baseline, matrix, requirement review, clarification impact and acceptance decisions.

> **Live-work test:** select an obscure contract clause and trace its treatment.

> **Week 7 - Control design, price and evidence -** Implement the solution design record, design inputs and criteria, review, verification, validation, change control, commercial model governance, value ledger and evidence cards.

Bring operations, finance and providers into the process before prose hardens. Test a failure case and a volume change.

Evidence to retain: reviewed design, model assumptions, approvals, evidence provenance and design changes.

> **Live-work test:** remove one key person or double one difficult volume. Record what changes.

> **Week 8 - Control writing and review -** Define answer plans, content briefs, sources, ownership, draft maturity, review purposes, entry criteria, finding severity, closure and release. Decide how AI-assisted work is controlled.

Do not mandate colour names merely because they are familiar. Define the job each review performs and retain evidence that the job was completed.

Evidence to retain: content plans, approvals, review records, closure and final checks.

> **Live-work test:** have a reviewer score a response before editing it.

> **Week 9 - Submission and handover -** Build the backwards plan, portal rehearsal, submission manifest, file-integrity check, receipt record, clarification control and promise register. Define the switch into mobilisation.

Run a rehearsal with a realistic failure: unavailable approver, rejected file or connection problem. Measure recovery time.

Evidence to retain: rehearsal, released baseline, manifest, receipt and accepted handover.

> **Live-work test:** ask delivery to explain three submitted commitments without support from the bid lead.

> **Week 10 - Resources, competence, providers and knowledge -** Determine role competence, evaluate current capability and address gaps. Review workload, tools, access, provider controls, partner commitments, evidence expiry and organisational knowledge.

Create the AI use register and data rules if AI is used. Confirm incident, verification and human-accountability routes.

Evidence to retain: competence evaluations, action effectiveness, provider monitoring, knowledge controls and technology decisions.

> **Live-work test:** simulate the absence of the person who holds the most process knowledge.

> **Week 11 - Measurement and internal audit -** Define KPI cards for a small, balanced set of measures. Include leading and lagging indicators and customer perception. Establish the audit programme based on process importance, change, risk and previous results.

Complete at least one end-to-end internal audit using live records. Audit an interface and a no-bid, not only a successful submission.

Evidence to retain: KPI definitions, data checks, audit plan, evidence, findings and follow-up.

> **Live-work test:** ask what decision each reported measure caused.

> **Week 12 - Corrective action and management review -** Contain and correct identified nonconformities. Perform cause analysis proportionate to the issue. Define effectiveness before closing actions.

Hold the first formal management review. Present context, customers, objectives, processes, nonconformity, audit, providers, resources, risks and improvement as decision material.

Evidence to retain: corrective-action records, management inputs, decisions, owners and follow-up.

> **Live-work test:** verify one completed action in the process rather than in a tracker.

> **Week 13 - Stabilise and decide readiness -** Walk the complete system. Confirm that documented information matches working practice. Sample current and completed pursuits. Close material gaps or record controlled plans.

If certification is intended, obtain competent advice on certification-body selection, accreditation, audit stages and timing. Do not select a certificate seller on speed alone. Verify claims and accreditation through appropriate authoritative routes.

Evidence to retain: readiness assessment, open-action plan, certification decision and transition monitoring for the forthcoming ISO 9001 edition.

> **Friday question:** could a competent person follow the process next week without the implementation lead translating it?

Daily, weekly, monthly and quarterly cadence - A QMS becomes believable through cadence. The following is a starting pattern, not a mandatory calendar.

Daily during live pursuits: control new documents and clarifications; update requirements and decisions; surface blocked owners; verify material changes; protect the authoritative baseline.

At each gate: review evidence, risk, resources, commercial position and readiness against stated criteria. Record decisions and exceptions.

Weekly: review pipeline quality, live-pursuit collisions, high-impact gaps, provider issues, evidence expiry and approaching irreversible dates. Keep the meeting short enough that people still have time to do the work.

Monthly: review objectives, process measures, customer feedback, nonconformity, corrective action, audit, competence and resource trends. Top management decides where intervention is required.

Quarterly: conduct management review at a depth proportionate to the organisation. Revisit context, interested parties, scope, strategic fit, climate relevance, provider dependence, technology and improvement. A stable conclusion is acceptable when evidence supports stability.

Annually or when material change occurs: review QMS scope, policy, objectives, process architecture, audit programme, competency needs, retention, standards status and certification arrangements.

Evidence index for certification readiness - The auditor will not need every record the organisation has ever created. The organisation does need enough objective evidence to show that processes are implemented and effective.

A useful index includes:

- QMS scope and process architecture;
- context and interested-party review;
- quality policy and objectives;
- roles, authorities and leadership decisions;
- risk and opportunity controls;
- opportunity gates, no-bids and overrides;
- capture plans and strategy decisions;
- tender baselines, compliance matrices and contract reviews;
- design inputs, reviews, verification, validation and change;
- controlled commercial models and approvals;
- evidence cards and permissions;
- content plans, reviews, closures and releases;
- submission manifests and receipts;
- promises and handover acceptance;
- competence, awareness and provider records;
- infrastructure, knowledge and AI controls;
- KPI definitions and analysis;
- customer perception and debrief learning;
- internal audit programme, reports and follow-up;
- nonconformity and corrective action;
- management-review inputs, outputs and completion;
- improvement and transition plans.

The index is a navigation aid. It should not become a second copy of every record. Link to controlled sources and preserve access boundaries.

The small-team version - A small business can operate this system without appointing a quality department. Combine roles carefully, but preserve authority and challenge.

The founder may own strategy and management review. A bid lead may own the pursuit process and documented information. Finance approves commercial commitments. Delivery owns solution truth and handover. A competent colleague or external person may provide independent review and internal audit where conflicts would otherwise be too strong.

Use short records. One opportunity gate can be two pages. One process card can fit on a page. One management review can be ninety minutes if the evidence is prepared. Proportionality is not absence; it is enough control for the consequence.

The high-volume version - A high-volume organisation needs more automation and clearer segmentation, not simply more forms. Define opportunity classes, mandatory controls and escalation thresholds. Integrate CRM, document management, evidence, workflow, pricing and analytics where it improves provenance and decision speed.

Centralise definitions and reusable evidence. Keep opportunity decisions local enough to remain informed. Use portfolio measures to expose systemic weaknesses, but retain the ability to follow one requirement through one real pursuit. Scale must not make accountability anonymous.

Final implementation test - Select four pieces of work:

1. a recent no-bid;
2. a live strategic pursuit;
3. a submitted loss;
4. an awarded contract in mobilisation or delivery.

Follow each through the QMS. Ask whether the right requirements were understood, the right decisions were made, the evidence was controlled, the promise was affordable and the learning returned. The system is ready to mature when the same logic survives all four routes without requiring a different explanation each time.

Toolkit G - Control Plans by Opportunity Type

The same QMS should not force every pursuit through the same amount of work. ISO 9001 asks the organisation to plan and control processes. It does not require a £15,000 quotation and a ten-year regulated service contract to receive identical treatment.

Define opportunity classes before pressure arrives. Each class should state mandatory controls, allowed simplifications, escalation thresholds and evidence expectations. The classification may change when new information appears.

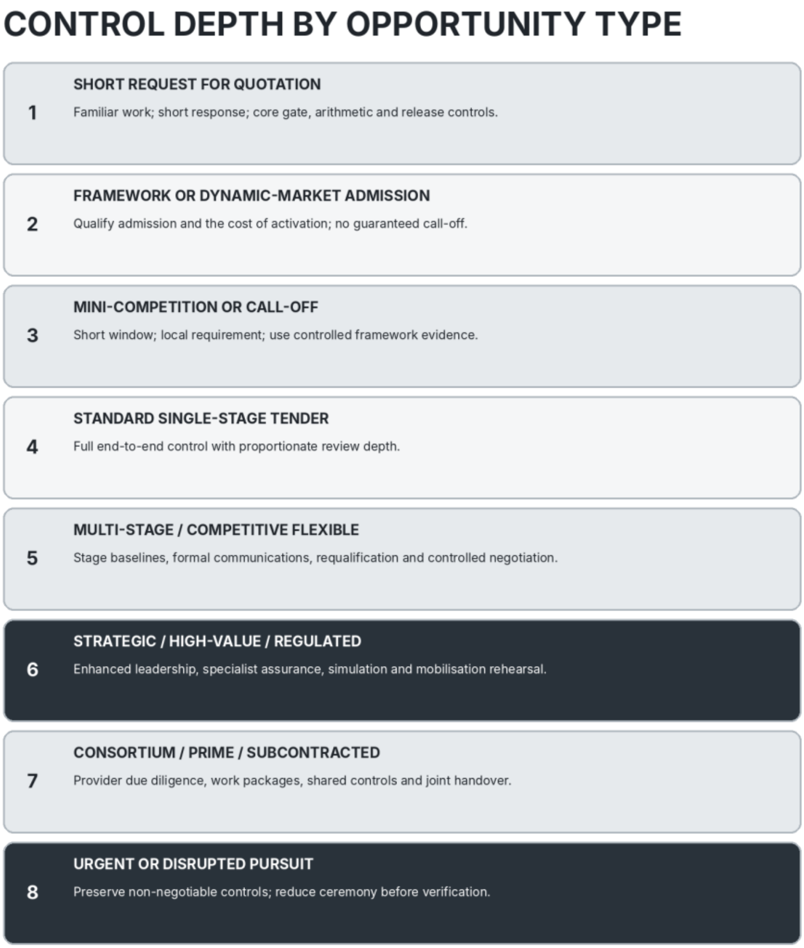

FIGURE 8 | CONTROL DEPTH BY OPPORTUNITY TYPE

Class 1 - Short request for quotation
A customer requests a price and short method statement for familiar work. The response period is five working days. The organisation has delivered the service repeatedly and the contract terms are known.

Minimum route: record the request and authoritative documents; confirm scope, deadline, eligibility and contract terms; check capacity and minimum margin; name one owner; create a short requirement list; obtain delivery and finance approval; verify price, commitments and files; submit with receipt; transfer the accepted quotation if awarded.

A full capture plan, multiple colour reviews and a large design record may add no value. A second competent person should still check material requirements, arithmetic and release. The quotation remains a controlled promise.

Escalate when: a new jurisdiction, unusual liability, personal data, subcontracting, mobilisation, high reputational exposure or untested service enters the request. What began as Class 1 may become Class 3.

Timing: triage within two hours where practical; gate on the day of receipt; requirements and price by the midpoint; final check before the last working day.

Evidence: opportunity decision, requirement check, approved quotation, release and receipt.

> **Typical failure:** the work looks familiar, so the team assumes the customer's version of familiar is identical to its own.

Class 2 - Framework or dynamic-market admission
The immediate objective is admission to a route through which later work may be competed or awarded. Published value is substantial, but no individual call-off is guaranteed.

Minimum route: qualify both admission and activation. Confirm eligible users, categories or lots, award routes, pricing constraints, management information, term, geography, call-off obligations and the cost of maintaining participation. Decide who operates the vehicle after admission.

The response still needs requirements, evidence, approvals and release. The business case also needs an activation owner, buyer map, portal-monitoring route, mini-competition capacity and review point. A framework won without an operating plan is a deferred nonconformity.

Escalate when: the vehicle requires binding rates, broad geographic coverage, significant provider commitments, catalogue maintenance or continuous competitions. Large ceilings do not reduce the need for a no-bid decision.

Timing: activation design begins before submission. Within ten days of admission, lock the documents and brief sales, bidding, finance and delivery. Within thirty days, map priority buyers and routes. Review commercial evidence at ninety days and at a period suited to the buying cycle.

Evidence: dual gate, admission response, framework route card, activation plan, buyer map, competition log and performance review.

> **Typical failure:** the company measures success at the award notice and notices the absence of revenue six months later.

Class 3 - Mini-competition or call-off competition
Only appointed suppliers may compete, and the response window is short. Generic framework material is available, but the buyer's local requirement decides the result.

Minimum route: verify eligibility and lot scope; baseline the call-off documents; qualify the specific work; identify departures from framework assumptions; build the local compliance matrix; review design, capacity, price and mobilisation; use current framework evidence; complete proportionate review and release; retain receipt; transfer promises.

Speed comes from pre-controlled sources and known roles, not from skipping the customer-specific work. The team should begin with a ready workspace, current certificates, evidence cards, pricing basis, mobilisation patterns and the framework terms.

Escalate when: the call-off changes volume, geography, service levels, risk allocation, data handling or provider dependence beyond the admission model. Confirm whether the proposed requirement and award route are permitted by the framework.

Timing: first gate within hours; source baseline and matrix on day one; solution and price decisions in the first third of the response period; review before the final third; internal deadline with real contingency.

Evidence: call-off gate, compliance matrix, changed-assumption record, model approval, review, release, receipt and handover.

> **Typical failure:** the supplier submits the framework answer again with the authority's name inserted.

Class 4 - Standard single-stage competitive tender
The procurement contains scored quality responses, price schedules, selection requirements and contract documents. The organisation has enough time for a complete campaign but not enough for disorder.

Minimum route: full qualification; capture consolidation; authoritative baseline; atomic compliance matrix; contract and commercial review; answer plans; solution design; evidence plan; pricing model; resource plan; structured reviews; release; portal rehearsal; submission; result analysis and handover.

This is the core process described throughout the book. Proportionality still applies. Not every answer requires the same review depth. Allocate attention according to score, risk, uncertainty and contractual consequence.

Escalate when: material assumptions remain unresolved, the contract contains unfamiliar exposure, the solution depends on unconfirmed providers, the margin approaches the approved floor or executive override is requested.

Timing: first forty-eight hours for triage, gate, baseline and requirements; answer plans and design criteria before broad drafting; commercial model early enough to shape design; Red review while meaningful change remains possible; release and upload before contingency is consumed.

Evidence: the complete process trail, with decisions and exact released files.

> **Typical failure:** the campaign spends its first half writing and its second half discovering what should have been decided first.

Class 5 - Multi-stage or competitive flexible procedure
The authority may use stages such as participation, initial solutions, dialogue, negotiation, demonstrations or revised tenders. The disclosed procedure governs what is permitted.

Minimum route: map the stages, decision points, information boundaries, evaluation rules and expected outputs. Establish a controlled baseline for each stage. Treat every customer interaction as formal communication. Requalify after material changes. Maintain a cumulative commitment and assumptions register so a later offer does not contradict an earlier representation.

Design and commercial authority must remain available throughout. A procedure that permits development does not permit casual promises. The organisation should distinguish negotiable positions, red lines, approval levels and information that may be shared.

Escalate when: the authority requests a change affecting scope, price, legal position, intellectual property, security, providers or deliverability. Obtain competent advice where procedural or legal interpretation matters.

Timing: plan the whole procedure at the start, then run a gate before and after each material stage. Brief participants before meetings. Record decisions immediately. Allow time after dialogue or negotiation for integrated design, price and contract updates.

Evidence: procedure map, stage baselines, communication records, change impacts, revised approvals, negotiation authority and final release.

> **Typical failure:** the presentation team makes an attractive commitment that the final written offer, price and delivery model cannot support.

Class 6 - Strategic, high-value or regulated pursuit
The opportunity could materially alter the organisation. Delivery failure may affect vulnerable users, public safety, regulated services, financial stability or reputation.

Minimum route: enhanced leadership oversight; independent qualification; formal campaign charter; deeper capture; specialist legal, security, financial and operational input; design reviews and simulations; provider due diligence; evidence assurance; commercial stress testing; independent Red team; executive risk hearing; controlled release; extensive handover and post-award tracking.

The process may require more records, but records are not the main distinction. Authority, competence, independence and evidence depth are. Senior attention must arrive before the final presentation.

Escalate when: any red-line condition is uncertain, forecast cash approaches limits, mobilisation relies on actions before contract signature, a material claim lacks evidence, or the organisation would need to become substantially different to deliver.

Timing: begin capture months before the notice where lawful and practical. Establish strategy and evidence gaps early. Protect review and commercial decisions from the deadline. Complete a mobilisation rehearsal before final release.

Evidence: enhanced gate and charter, specialist opinions, simulation results, decision records, stress cases, review closures, risk acceptance and signed delivery ownership.

> **Typical failure:** prestige suppresses challenge, and senior people arrive late enough to change words but too late to change reality.

Class 7 - Consortium, prime or heavily subcontracted pursuit
The offer depends on several legal entities, work packages, evidence sources and commercial relationships.

Minimum route: decide prime, partner or subcontract role; define governance, liability, scope, margin, data, intellectual property, payment and dispute routes; perform proportionate due diligence; confirm capacity and evidence; align answer ownership; cross-review commitments; control shared documents and access; include every partner in mobilisation and promise transfer.

The prime's QMS must control externally provided work that affects conformity. It does not need to absorb every partner's management system. It does need clear requirements, selection, monitoring, acceptance and escalation.

Escalate when: a partner controls a critical service, key evidence, customer relationship, certification, licence, resource or mobilisation dependency. A late partner change is a design and commercial change.

Timing: form the operating relationship before detailed writing. Agree work packages and rates before promising them. Complete partner truth checks before Red review and again before release. Confirm submitted commitments after award.

Evidence: role decision, agreements, due diligence, provider controls, shared plan, approved content, price alignment and joint handover.

> **Typical failure:** the consortium appears integrated on the organisation chart and separates into unrelated companies when the evaluator asks one operational question.

Class 8 - Urgent or disrupted pursuit
The response period is unusually short, key people are absent, the customer issues late changes or a technical incident reduces normal capacity. Urgency changes the plan. It does not change the meaning of conformity.

Minimum route: identify the non-negotiable controls: qualification, authoritative requirements, commercial authority, factual ownership, release and submission verification. Reduce scope and ceremony before reducing verification. Appoint deputies and one decision authority. Record exceptions and residual risk.

Use controlled source material and defined opportunity classes. Avoid creating a new process during the incident. If the organisation cannot perform the essential controls, decline or seek a lawful alternative rather than submit a confident unknown.

Escalate when: the deadline removes time for a material legal, commercial, security or delivery decision; the final approver is unavailable; source documents are incomplete; or the portal incident threatens submission.

Timing: establish command in the first thirty minutes. Build the kill sheet and decision list before prose. Protect a final contingency window. Freeze changes when upload starts.

Evidence: incident plan, exception record, approvals, exact baseline, manifest, receipt and post-event review.

> **Typical failure:** the team treats urgency as permission for everybody to edit everything at once.

Toolkit H - Role-by-Role Operating Guide

A process works when people know what decision belongs to them, what evidence they must provide and when their authority ends. The following role guide is deliberately practical. Job titles vary. Combine roles in small organisations, but do not combine accountability so completely that nobody can challenge anybody else.

Top management - Top management sets scope, policy, objectives, risk appetite and resources. It appoints process owners and gives them authority. It decides material overrides and reviews whether the QMS remains suitable, adequate, effective and aligned with strategy.

Enter the pursuit: at strategic qualification, material requalification, unresolved red lines, resource conflicts, final risk acceptance and management review.

Do not: rewrite answers at midnight or approve commitments without understanding the operational and commercial effect.

Evidence: decisions, resources, objectives, reviews, risk acceptance and completed actions.

Bid or proposal director - The director owns the pursuit operating model across opportunities or a major campaign. They ensure that strategy, resources, governance, reviews and commercial authority are in place.

Enter: before commitment, at campaign charter, strategy review, major design choices, Red review and release readiness.

Do not: become the only person who understands the system or use seniority to close technical findings.

Evidence: charter, gate decisions, review direction, escalation and final recommendation.

Bid manager - The bid manager integrates the campaign. They control plan, requirements, actions, dependencies, content, reviews, versions, deadlines and submission. They do not own every fact.

Enter: from first triage or appointment through archive and handover.

Do not: accept unowned content, hide blocked decisions or substitute project administration for judgement.

Evidence: plan, matrix, decision log, status, review closure, release pack and receipt.

Capture manager or opportunity lead - The capture lead develops lawful customer and market understanding before the formal response. They turn insight into qualification, strategy, actions and evidence gaps.

Enter: when an opportunity is strategically important enough to justify pre-tender work.

Do not: represent inference as buyer fact, pursue private access during a live competition or retain useful knowledge only in personal notes.

Evidence: capture plan, sources, stakeholder roles, strategy choices, actions and handover into the bid.

Solution lead - The solution lead owns the coherence and deliverability of the proposed service. They bring specialists together, define design inputs, manage decisions, test failure and control change.

Enter: before answer plans harden and remain through clarification, negotiation and mobilisation.

Do not: approve a method detached from price, contract, resources or provider capacity.

Evidence: design record, reviews, verification, validation, changes and delivery acceptance.

Commercial or finance lead - The commercial lead owns cost, price, margin, assumptions, cash, sensitivity and approval. They connect the narrative promise to the operating model.

Enter: at qualification, early design, price strategy, design change, final model approval, negotiation and handover.

Do not: arrive only to populate the buyer's workbook or cut cost without tracing service consequence.

Evidence: controlled model, assumptions, sources, approvals, stress tests and reconciliations.

Legal, contracts or risk adviser - This role interprets material contractual and legal exposure within competence and authority. It identifies where specialist advice is required.

Enter: during qualification and contract review, then at clarifications, departures, negotiations and post-award discrepancy.

Do not: become a late pass/fail signature on a contract the solution has already assumed away.

Evidence: issue log, advice, decisions, accepted departures and approval.

Subject-matter expert - The expert provides technical truth, operational detail, evidence and constraints. Their job is not necessarily to write elegant prose.

Enter: during requirements review, design, evidence selection, content development, review and handover.

Do not: approve wording without testing whether the method works, or withdraw because the blank page feels uncomfortable.

Evidence: interview notes, source approval, design input, factual attestation and delivery ownership.

Bid writer - The writer turns approved thinking into a responsive, readable and persuasive answer. They expose gaps rather than covering them with fluent language.

Enter: at answer planning and remain through review closure and production.

Do not: invent operational detail, convert aspiration into commitment or treat style authority as factual authority.

Evidence: content brief, controlled sources, drafts, resolved questions and approved final text.

Reviewer or Red-team lead - The reviewer tests what the evaluator can conclude. They assess compliance, responsiveness, credibility, differentiation, commercial coherence and deliverability according to the review purpose.

Enter: only when entry criteria are met and meaningful change remains possible.

Do not: begin with grammar, rewrite according to personal taste or open findings without severity, owner and closure route.

Evidence: brief, scores, findings, rationale, closure and review-performance learning.

Production and submission owner - This role controls final format, accessibility, filenames, cross-references, file integrity, portal fields, upload and receipt.

Enter: during planning and rehearsal, not only at the deadline.

Do not: change content silently, compress files without verification or upload a version identified only as "final final".

Evidence: production check, manifest, released baseline, upload verification and receipt.

External provider or partner manager - The manager selects, briefs, monitors and escalates external work affecting the bid or proposed service. They ensure that partner truth reaches the submission.

Enter: at capability-gap identification, provider selection, work-package design, content approval and handover.

Do not: treat a logo, historic relationship or certificate as proof of current capacity and commitment.

Evidence: evaluation, due diligence, requirements, acceptance, monitoring, rates, evidence permissions and escalation.

Quality manager or QMS process owner - This role enables the management system, maintains its architecture and supports process owners. It coordinates audits, corrective action and management review without taking ownership away from commercial and operational leaders.

Enter: during QMS design, process change, audits, systemic issues, management review and certification activity.

Do not: become the person who completes records after everybody else has finished the real work.

Evidence: process architecture, audit programme, system changes, analysis and management follow-up.

Internal auditor - The auditor follows evidence against criteria and evaluates both conformity and effectiveness. Independence must be sufficient for the scope and risk.

Enter: according to the risk-based audit programme and after significant change or recurring failure where useful.

Do not: audit only the presence of procedures or advise so extensively during the audit that they later audit their own solution.

Evidence: plan, sample, trail, objective evidence, findings and follow-up.

Delivery or mobilisation lead - The delivery lead determines whether the proposed organisation can exist after award. They accept commitments, mobilise resources and return performance evidence to future pursuits.

Enter: during qualification and design, before release, immediately after award and throughout mobilisation.

Do not: meet the bid for the first time at the handover meeting.

Evidence: design challenge, resource acceptance, promise register, mobilisation plan, performance and lessons.

Technology, data or AI owner - This role governs approved tools, access, data classes, integration, retrieval sources, security, retention, incident response and technical change.

Enter: when systems are selected or changed, when sensitive data or AI use is proposed, and when incidents or new customer requirements arise.

Do not: imply that enterprise licensing guarantees accuracy, lawful use or suitable disclosure.

Evidence: approvals, configuration, access, use register, tests, incidents and review.

The responsibility test - For each material process, ask five questions:

1. Who performs the work?
2. Who owns the result?
3. Who supplies facts or approval?
4. Who must be informed?

5. Who may stop, override or release?

If the same name appears in every field, the organisation may be small. It may also have a control problem. Decide which is true, then build the least burdensome challenge that protects the customer and the business.

Toolkit I - The Pursuit Clock

A process map shows sequence. A clock shows when delay becomes dangerous. The timings below assume a twenty-working-day tender. Adjust them to the real procurement, opportunity class and risk. Do not turn the example into a new rule that overrides the buyer's dates.

FIGURE 9 | THE PURSUIT CLOCK

The first two hours - Preserve the notice and native files. Record the authoritative links, issue time, deadline, clarification deadline, lots, portal and first owner. Confirm that the opportunity is genuinely new and not a duplicate record.

Open the documents far enough to find the conditions that can end the bid: eligibility, insurance, turnover, licences, geography, mandatory experience, conflicts, security and submission form. Do not read only the summary page.

Schedule the triage. Identify who must attend and which information they need. If a fatal condition is already clear, escalate it before the organisation celebrates.

Output by hour two: controlled source pack, first kill-sheet entries, decision owner and triage time.

By the end of day one - Complete rapid qualification. Confirm strategic fit, customer need, capability, capacity, commercial shape, competition, route and major risk. Record assumptions and evidence. Decide bid, no-bid, hold or clarify.

If the pursuit proceeds, appoint the bid manager, solution lead, commercial lead and content owners. Establish the working location, access, naming and decision log. Baseline the documents. Begin the compliance matrix and contract review.

Send only essential clarification questions that cannot wait. A question asked because nobody has read Appendix 6 is not urgent.

Output by day one: gate decision, campaign ownership, document baseline, initial matrix, high-impact gaps and immediate actions.

The first forty-eight hours - Decompose scored questions and schedules. Identify response components, evaluation weight, word limits, required evidence and approval. Map the price mechanism. Review the contract for obligations that could alter qualification or design.

Create the campaign plan backwards from the internal submission deadline. Set design, pricing, content and review gates. Reserve contingency. Confirm external-provider needs and obtain evidence early.

For a captured opportunity, transfer customer insight and strategy into the formal record. Discard any intelligence contradicted by the solicitation.

Output by forty-eight hours: usable compliance matrix, answer-plan shells, commercial model structure, solution workshops, evidence requests, review calendar and requalification triggers.

Days three to five - decide before drafting spreads - Agree design inputs and criteria. Develop the core solution with operations, finance and providers present. Test an awkward scenario. Establish staffing, technology, mobilisation, governance, service levels, measures and recovery. Begin cost from the same design.

Select evidence that transfers. Where proof is weak, label the gap rather than giving the writer an optimistic instruction. Agree win themes as evidence-backed arguments connected to the score.

Writers may begin sections whose thinking is stable. They should not be rewarded for completing paragraphs around unresolved service design.

Output by day five: reviewed solution direction, first priced design, evidence plan, answer positions and material decisions.

Days six to nine - build the controlled offer - Develop responses from the answer plans. Run factual and technical checks as work progresses. Extract commitments rather than waiting until the end. Keep the price narrative aligned with model changes.

Hold a Pink or equivalent story and structure review where useful. The question is whether the proposed answer covers the requirement with a credible logic, not whether every sentence is elegant.

Close clarifications and assess impact. Requalify if the commercial or delivery position has moved materially.

Output by day nine: complete answer logic, controlled draft set, current model, owned gaps, closed high-risk clarifications and revised gate where required.

Days ten to thirteen - challenge while change remains possible - Complete Red review or its equivalent. Brief reviewers to score and explain doubt. Attack compliance, solution, evidence, differentiation, price, contract and delivery. Classify findings by consequence.

Treat material findings as changes to the offer. If a reviewer adds a standby team, a new platform or stronger service level, return to design and price. Do not close the finding with prose alone.

Track closure separately from authoring. Require objective evidence that each serious issue is resolved.

Output by day thirteen: review findings, approved changes, updated model and design, closed critical defects and residual risk list.

Days fourteen to sixteen - verify the whole submission - Verify requirements, figures, names, dates, commitments, cross-references, schedules, appendices and model consistency. Validate the offer with intended users or delivery leaders where proportionate. Run the Monday-morning and difficult-day tests.

Conduct commercial and contract approvals. Confirm provider commitments. Extract the promise register. Production begins from a controlled baseline.

Output by day sixteen: technically and commercially approved content, promise register, production baseline and release actions.

Days seventeen to eighteen - produce and release - Complete formatting, accessibility, word counts, filenames, file size, signatures and portal-field preparation. Compare produced documents with approved source content. Rehearse the upload using a non-final pack where the portal permits.

Hold Gold or final release review. This is not a late strategic rewrite. Confirm compliance, completeness, exact files, approvals, residual exceptions, contingency and submission authority.

Output by day eighteen: released file set, completed manifest, approved contingency versions and upload readiness.

Day nineteen - submit under control - Upload before the internal deadline. Use one authorised uploader and an independent verifier. Confirm every file and portal field. Retain receipt, screenshots or other evidence. Lock the submitted baseline.
If the portal fails, follow the rehearsed incident route. Keep a factual timeline. Do not create unapproved files because people feel active while waiting.

Output: verified submission and evidence of receipt.

Day twenty and after - remain accountable - Confirm that the authority has not issued an immediate request or system message. Control clarifications, presentations, negotiation and revised offers against the submitted baseline. Every new commitment requires the same factual, operational and commercial authority as the original bid.
Prepare conditional win, loss, delay and review routes. Do not leave the team suspended until the award notice.

Within one working day of the result - Preserve the notice and assessment information. If successful, open mobilisation, transfer the promise register and confirm delivery acceptance. If unsuccessful, separate legal or procedural review from learning and emotion. If delayed, update resources and assumptions.

Output: result decision, controlled archive, handover or learning route and stakeholder communication.

Within thirty days of award or loss - For an award, compare tender assumptions with mobilisation reality. Track disputed or unpriced commitments and correct them before service failure. Establish customer feedback and evidence capture.
For a loss, compare predicted and actual evaluation, identify evidence debt and select a limited number of process improvements. Do not turn every evaluator preference into a permanent rule.
For both, update reusable knowledge only after verification and permission.

Within ninety days - Review whether the pursuit process produced the intended result, regardless of the award. Examine decision quality, compliance defects, forecast accuracy, review effectiveness, provider performance, workload, customer perception and handover.
Raise corrective action where a requirement was not met or a systemic cause exists. Feed relevant evidence into internal audit and management review. Close the campaign only when knowledge and obligations have somewhere controlled to go.

The clock test - At any point, the bid manager should be able to answer:

- What is the next irreversible decision?
- What evidence is missing for that decision?
- Who owns it?
- When does delay begin to remove options?
- Which control must not be traded away?
- What does the customer or delivery team experience if we are wrong?

The answer may change every day. The discipline should not.

Toolkit J - The Minimum Useful Scoreboard

Measures should help somebody decide. Start with a small set and define them properly. Add a measure only when the organisation knows what question it answers and what action may follow.

FIGURE 10 | THE MINIMUM USEFUL SCOREBOARD

Pipeline decision quality - Track decided opportunities by class, bid, no-bid, hold and override. Compare forecast probability with actual results over time, but do not use win rate as the only verdict. Review whether red-line opportunities were entered, whether strong opportunities were declined through lack of capacity and whether published ceilings have contaminated the forecast.

Decision: change qualification criteria, capacity, targeting or authority.

Requirements and compliance - Measure material requirements found late, compliance defects by source and any defect discovered after release or submission. Use a denominator: per bid, per hundred requirements or per opportunity class. Separate minor drafting corrections from defects capable of rejection, score loss or contractual exposure.

Decision: improve intake, source reconciliation, training, automation or independent verification.

Design and commercial coherence - Track material solution changes after price freeze, unpriced commitments found at review or handover, model errors, and variance between forecast and actual mobilisation resource. The objective is not zero change. It is earlier, visible and controlled change.

Decision: move design or commercial involvement earlier, change review entry criteria or improve model lineage.

Evidence readiness - Monitor high-value evidence gaps, expired or unpermissioned assets, repeated evaluator concerns and the time needed to obtain approved proof. Distinguish evidence availability from evidence relevance.

Decision: fund measurement, references, rehearsal, case development or a narrower claim.

Review effectiveness - Measure serious findings by review stage, recurrence, closure time and later evaluator feedback. A late review that finds many defects may be effective at detection and ineffective in timing. A review that finds nothing may reflect excellent readiness or weak challenge.

Decision: alter reviewer competence, brief, timing, independence or entry criteria.

Submission control - Track internal-deadline achievement, upload incidents, file defects, rejected portal fields, receipt verification and contingency use. Do not reward teams for submitting early if the content was released without necessary authority.

Decision: change planning, rehearsal, production control, access or final freeze.

Handover and delivery truth - Measure promises disputed at handover, mobilisation changes caused by tender assumptions, unbudgeted commitments and the percentage of material promises with accepted delivery owners. Add customer and contract-performance evidence when available.

Decision: improve promise extraction, approval identity, delivery involvement or contract transition.

Improvement health - Track repeat nonconformities, corrective-action effectiveness, aged audit findings and improvements that remove rather than add work. Count open actions cautiously. A large action list may indicate transparency, weak prioritisation or both.

Decision: escalate, simplify, resource or stop ineffective action.

The one-page rule - Present the scoreboard on one page where possible. Include definition, current position, trend, interpretation, risk and requested decision. Keep supporting analysis behind it.

A management team does not need twenty green arrows. It needs to know where the pursuit system is becoming unsafe, expensive or less convincing, and what it must decide before the next bid reaches the same point.

SOURCES AND PROFESSIONAL NOTES

This book is practical implementation commentary. It does not reproduce the text of ISO 9001 and cannot replace an authorised copy of the standard, competent professional advice, opportunity documents or an organisation's own judgement.

At the time this edition was prepared, the published certification basis discussed in the book was **ISO 9001:2015**, together with **Amendment 1:2024**, which introduced climate-change consideration into the context and interested-party requirements. ISO's sixth edition of ISO 9001 was in the publication stage and expected in September 2026. Organisations should verify the status, transition arrangements and applicable certification requirements at the point of use.

The APMP alignment in this book is based on the public description of the APMP Winning Business Ecosystem and APMP's published professional resources. APMP terminology is used to explain alignment; this book is independent and is not issued, approved or endorsed by APMP.

Primary and official references

1. International Organization for Standardization, **ISO 9001:2015 - Quality management systems - Requirements**. Obtain the authorised standard through ISO or an authorised national standards body.
2. International Organization for Standardization, **ISO 9001:2015/Amd 1:2024 - Climate action changes**.
3. International Organization for Standardization, **ISO 9001 and related revision-status pages**, including the status of the sixth edition at publication.
4. ISO/TC 176 and ISO guidance, **The Process Approach in ISO 9001:2015**.
5. ISO 9001 Auditing Practices Group, **Guidance on Processes** and related public audit-practice papers.
6. Association of Proposal Management Professionals, **Winning Business Ecosystem**.
7. Association of Proposal Management Professionals, **Body of Knowledge and professional competency resources**.
8. Association of Proposal Management Professionals, **Compliance Matrix Template** and related publicly available tools.
9. United Kingdom Accreditation Service, public guidance on **accreditation and certification**.
10. United Kingdom Accreditation Service, **UKAS CertCheck**, for verification of relevant accredited management-system certificates where applicable.

Independent status

Bid Quality by Design is an independent publication. It is not affiliated with, sponsored by or endorsed by ISO, APMP, UKAS, a certification body, the UK Government or any contracting authority.

ISO standards and APMP materials remain the intellectual property of their respective owners. References are provided for professional orientation and further study. Readers should consult current authorised and official material.

FINAL DISPATCH

A quality-managed bid process is not a promise that every competition will be won. It is a promise of a different kind.

The organisation will know why it entered. It will understand what the customer asked. It will make choices before prose hides them. The price will belong to the service described. Evidence will have a source. Review will have a purpose. Release will mean something. The file on the portal will be the file that was approved. And when the contract begins, delivery will not meet the bid for the first time.

ISO 9001 supplies a management discipline. APMP supplies a rich professional view of winning business. Neither removes judgement. Neither writes the answer. Together, when used without theatre, they create a strong operating frame around the entire pursuit.

Build the frame. Put live work through it. Listen when it creaks.

Then improve the part that actually moved.

Qualify honestly. Design completely. Write clearly. Review severely. Release deliberately. Handover what you promised.

Quality should shape the bid before the certificate is ever mentioned.

ISO 9001 is often reduced to a certificate and a copied policy. This field manual turns it into a working bid management system. It shows how to connect context, process mapping, leadership, qualification, capture, compliance, writing, review, submission, handover, audit and improvement into one controlled pursuit model.

With toolkits, crosswalks, role guides, audit questions and a ninety-day build plan, it helps teams turn inconsistent bidding into repeatable, evidence-led delivery.

- ISO 9001 clause-to-bid crosswalks
- Process and control toolkits
- Audit and management review guidance
- Ninety-day build plan

Rachelle Potes

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