

# Better bid proposals for collaborative projects



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**Assessment of potential partners' collaboration capabilities in many procurement exercises is common. Whilst a range of assessment methods are available, evaluation of written tender submissions remains the most liked approach. This case study highlights lessons for those setting tender questions and for tenderers in responding to them to both improve the quality of the tender submission and, importantly, ensure it adds value to post contract award collaboration development.**

There are a range of assessment and evaluation methods available to procurement teams to help them evaluate the collaboration approach capabilities and behavioural competences of their potential partners (Fig 1). While the methods vary in their ability to predict future behavioural performance<sup>(1)</sup>, the written tender submission method remains the most common "go to" approach for procurement teams.

This case study focuses upon the effectiveness and improvement of written tender questions for the selection of

collaborative partners and how to increase their potential value to promote effective collaborative working once the contract has been awarded.

### Partner procurement selection methods

Over 2020/21, B2B designed and delivered a behavioural and collaborative approach assessment (BCA) for the selection of delivery partners (DPs) working across a programme to support a UK government department in a significant infrastructure project. The £6bn contract is operating in a complex technical environment,

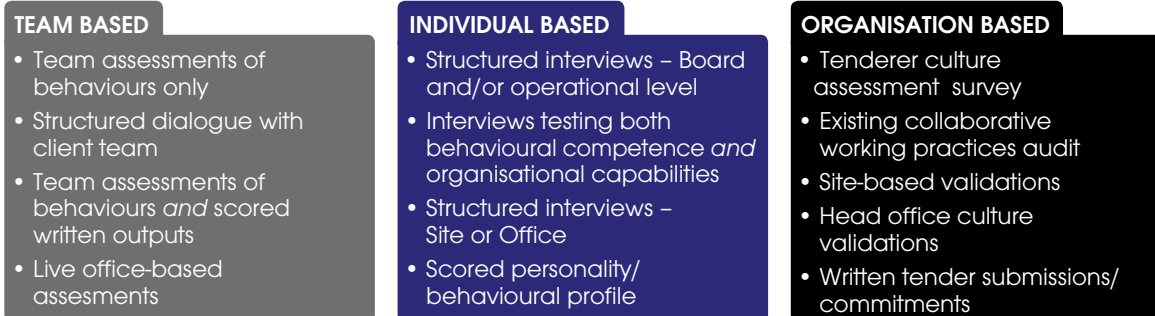
with the procuring organisation and the DPs under pressure from UK and international stakeholders and customers with diverse expectations, requirements and technical standards.

Working with the client, B2B deployed an early version of its collaboration risk assessment model – featured in the the 2022 edition of *The Partner*. The key criteria areas that were identified were: effective approaches for stakeholder engagement, accelerated development of a disciplined approach to managing the relationships across the programme, and having a robust approach to joint risk management.

The behavioural and collaborative assessment (conducted remotely during lockdown) included:

- 1 A structured **team assessment of behaviours** of the proposed key team members to test their proposed approaches to manage the collaborative relationship and engagement of stakeholders if successful.
- 2 Evaluation of collaborative competences and behaviours of key operational managers via a structured **behavioural CV** instead of a face to face interview.

**Fig 1 Approaches to evaluate collaboration capabilities in procurement**



**3** Evaluation of three **written tender submissions** related to the management of collaborative working related to the three criteria above.

### Post-award collaboration support

We were also commissioned, as part of the procurement exercises, to assist in the launch of the collaborative relationships in the post-award phase between the DPs and between DPs and their government department client. In addition to a launch workshop, a follow-up collaboration health check survey and a later improvement workshop, these were informed by the innovative re-use of the originally submitted tender material in order to develop relationship management plans at an accelerated pace.

### Issues with tender questions related to collaborative working

Our experience shows that there can be issues from the client-side and the tender-side which make the evaluation of written tenders ineffective for the scoring of a submission and limit the value of the submission to post-award contract delivery:

- 1** Tender questions can be phrased inappropriately to focus upon the tenderer's past experience or the general availability of a given collaboration approach and do not seek forward looking proposals on specific aspects for implementation in the specific contract.
- 2** Tender questions can often be phrased in such general terms that they fail to elicit specific commitments or proposals i.e. what is promised to be done by the tenderer, how it will be done and by when. Consequently,

they are not only difficult to score effectively, and differentiate between tenderers, but would be difficult to implement in the post-award phase without considerable clarification.

- 3** The level of insight, expertise and qualifications to assess "what great looks like," in collaboration management terms, is often limited within the client-side evaluators.

These factors often feed into a post-award situation where the implementation of collaborative working tender proposals have to compete with more specific tender proposals for the so-called, "hard" contract deliverables e.g.

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a highway, railway or building. A consequence is that the collaboration proposals requested by the client, and offered by the tenderer, often fail to materialise effectively, quickly enough, *if at all*. This must be one contribution to the high failure rates in collaborative enterprises.

In summary, collaboration-focused tender questions often serve only as award scoring material and are often of little value to guide post-award

actions. Tender proposals, often, in response to the quality of the tender question, are frequently too general and not easily open to implementation. This is a waste of effort all round and could even be a strong causal factor for the reasons why so many collaborative relationships get off to a poor start or don't start properly at all.

### The case study approach

Our aim in this project was to mitigate these risks by: using forward-looking tender questions entailing requests for specific commitments by the tenderer; and re-using the submitted tender material in the post-award period to generate accelerated actions. We advised the client that the tender questions should be designed to elicit specific and actionable proposals and that the procurement process should be designed to go beyond selection and to support a post-contract award relationship development process by making use of those tender commitments made by the successful tenderers.

The collaboration-related tender questions were:

- 1** Describe the Tenderer's intended approach to embedding processes and structures that will mitigate the risks associated with developing and maintaining effective collaborative working when delivering the service.
- 2** Describe the Tenderer's intended approach to develop a collaborative process to the management of continuous improvement that ensures both the Agency, Tenderer's and Service User knowledge is utilised to identify improvement activities and develop solutions to improve service delivery.

- 3 Describe the Tenderer's intended approach to developing and managing key stakeholder relationships to ensure that the stakeholder's engagement is proportionate, and the relationship with them is collaborative and effective.

Each question was phrased to obtain specific tender commitments, and had additional advice on the aspects or components that the tenderer was requested to address in their submission e.g. timeline, key responsibilities, risks to be mitigated.

In addition to scoring the initial submissions, the client also required us to undertake a subsequent review of the submissions of the successful tenderers in order to support a re-use of them within the planned collaboration workshops undertaken in the early stages of mobilisation; more specifically to support an accelerated development of a joint relationship management plan (JRMP).

A systematic process was built in to the procurement plan to follow up on the implementation of tender submissions for the establishment of the relationship, highlighting the positives in the submissions for deployment and the areas for further development if to be of value to contract delivery.

### Post-contract award treatment of the tender submissions

Options put to the client to identify ways to build upon the initial successful tender submissions were:

- 1 Request each tenderer team to review their proposals and identify ways of improving their actionability and coming equipped with those ideas for discussion with the client in the collaboration workshops
- 2 As with Option 1, but with an advisory note to the tenderer from B2B on the specific areas for improvement in their proposals
- 3 Request each of the three successful tenderers, and their respective client teams, to review the proposals and identify those considered to be a priority and agree an indicative timeline for delivery.
- 4 Option 3 with the inclusion of using the contract KPIs to assist in identifying key priorities

Option 2 was selected by the client. The original tender responses were returned to each successful tenderer for each submission to be marked up to indicate where there were strong and implementable proposals, and where there were areas for development or clarification. The successful tenderers and client operational teams brought these views to the collaboration launch workshops, where they agreed actions to include in the establishment of a JRMP.

The importance of engaging the client in deciding the best and most feasible approach for the re-use and implementation of tender submissions should not be over-looked.

### Benefits and outcomes

The collaboration workshops, undertaken in the early weeks of the contract, formed good relationships across the teams, a collaboration behavioural profile, clarity on roles, and development of an outline charter. They also produced actions plans, owners and a timeline for the development of the collaborative relationship, including the creation of a JRMP and stakeholder engagement strategy.

A six-month, two-way behavioural and collaboration "health check" survey was undertaken between client and each DP team to create a baseline set of metrics for the identification of successful behaviours and approaches being demonstrated, and for the targeting of areas for improvement and development.

A comprehensive collaboration charter and behavioural competence framework was completed with plans to share it across the delivery teams.

The jointly completed and project-specific JRMP was compliant to ISO 44001 best practice.

### Conclusions

At the time of writing, the process and outcomes had not yet been subjected to a long-term return on investment appraisal. However, the outcomes of this case study to date clearly show that procurement processes for the selection of collaborative partners should always look beyond the selection decision; they should have a plan, in advance of the contract award, to ensure the procurement outputs are used to add value to embedding effective collaborative working in the future relationship.

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Where tenderers can remain compliant with the client tender submission instructions, they should play their part by ensuring they populate their tender responses with tangible and actionable proposals, including recommendations.

Behavioural assessments of people (Fig 1) are, in our opinion, another aspect of procurement which should be much more than a selection process. If designed and delivered to quality behavioural assessment standards<sup>(2)</sup>, they can also provide accurate information, well in advance of the award, to identify future collaborative working risks and opportunities. The results of this can be ready to inject into post award collaborative development and behavioural risk mitigation from the start of the contract.

#### **Improvements to the approach**

Collaboration between partners is, at the very least, a two-way street. In common with most public procurements using BCA, the client-side team in this case study was not assessed for their collaborative working competence in advance of their engagement with the

successful tenderer. Nor were they developed as a team to engage in a collaborative endeavour with the tenderer in advance of the collaboration launch workshops above.

In our experience, the usual consequence of this asymmetric level of collaborative working readiness is that the tenderer team – certainly in the early stages, provides the greater maturity in collaborative behavioural problem solving and also provide their processes and approaches for collaborative working. There can be unhelpful misalignment in behaviours and approaches due to the different levels of readiness.

Assessment of the client team capabilities has been undertaken by B2B in a small number of procurement support contracts, and, in a smaller number still, we have undertaken the development of the client team to be ready for the incoming successful tenderers. Fortunately, there is a growing awareness in procuring organisations that

they are an essential part of the collaboration chemistry and that they need to be prepared to engage as equals with the tenderer once they are appointed so they are fully able to contribute in joint development work undertaken in the early stages of the relationship.

If both the client side and supply chain partners are assessed and developed at a similar time, and using a similar methodology, (and before team integration), this will result in a quicker project mobilisation with results and outcomes being delivered earlier and to a higher standard.

An overall lesson is that advanced client team behavioural development, and having more considered views on their collaborative working priorities, would have improved the collaboration launch process and improved further the quality of the outputs produced in the early stages of the relationship development in this case study. ■

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#### **References:**

- 1 Chmiel. N (2009) Work & Organisational Psychology 2nd Ed Blackwell (fig 12.3)
- 2 ISO 10667-2:20 International Standard for behavioural assessment quality management