pre RFP
BD planning

exercise

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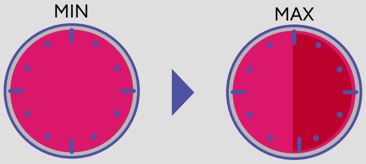
MIN MAX



60 minutes 90 minutes

PURPOSE
to create a plan for strategic opportunity BD conducted before the RFP is posted

PARTICIPANTS
Members of a team involved in business development

EQUIPMENT
Interactive white board or Mural

ONLINE or LIVE
Both, one or the other

INDUSTRY
Any competitive pursuit for complex services or as a general team planning exercise for BD

The following exercise (and the corresponding template in Twennie library) can be used for a ***Pre-RFP BD Planning exercise***, a 60-90 minute exercise during which a team establishes a new set of processes, tools, and techniques for pre-RFP business development strategies. If you want to extend your work beyond the 90 minutes, consider doing a series of sessions. Stretch it across two BD meetings, if you like. Then you don't have to set aside time you weren't already using for BD.

Pre RFP BD
business development for specific opportunities that does not involve a proposal and precedes the posting of the RFP

STEP 1 choose a collaborative medium

Either have the template printed on large paper, projected onto a white wall, or use it as a background in Mural or other online planning tool. To save time, organize this well before the session starts.

suggested tool:
template
Pre-RFP Business Development Planning Display

STEP 2 prepare the materials

Print the Pre-RFP Strategy Task Cards or create notes containing the content of the cards. Simply copy and paste from the Twennie template to the online medium. Make sure they are movable in the medium so you can place them in the correct spots.

suggested tool:
template
Pre-RFP Business Development Planning Task Cards

FACILITATOR TOOLS: As the facilitator, you must be prepared to keep this exercise moving swiftly. Have the materials prepared ahead of time. Understand the tasks and templates before the session. Establish ground rules and budget time based on the suggested time intervals for each step.

exercise

MAX 10 mins

STEP 3 add tasks

Choose from the task cards the ones you want to implement. If you have others, add those using pink notes or create new cards in the template.

MAX 5 mins

STEP 4 decide on learning

Decide what new skills and knowledge your team will develop. Suggestions can be found on the task cards. Use orange notes for additional learning you've planned.

MAX 5 mins

STEP 5 decide on terms, technology and next steps

Decide on at least three key terms you will use to describe pre-RFP BD activities. Use peach, taupe and purple notes.

MAX 10 mins

STEP 6 decide pull marketing (events and social media)

Decide what you'll post, where and when.

Decide on at least three events you'll do in pursuit of major opportunities.

MAX 8 mins

STEP 7 create accountability

Decide who is accountable for each task, when. Try to spread this accountability so the managers aren't doing it all. Use black notes for names.

MAX 8 mins

STEP 8 budget time

Use green notes to put caps on all identified activities. Choose job numbers, if necessary. Consider breaking up opportunities into categories of investment. For the most strategic opportunities, plan a full schedule. Choose two further categories for smaller opportunities and create a plan for each with budgeting.

MAX 5 mins

STEP 9 fun

All the task cards suggest fun ways to complete these tasks. Choose at least one or create your own using Twennie's suggestions as inspiration. Adding fun to tasks is an excellent way to engage people and help them be more creative.

Internal fun can energize the team. Fun with the clients can make you stand out in the crowd as a team that is more fun to interact with. Consider choosing one fun activity for the team and one for clients, as a minimum.

exercise

IF YOU ARE THE FACILITATOR

If your team is new to this exercise, the role of facilitator becomes critical. Here are some tips from other facilitators who have led this exercise:

Help people arrive prepared; Too often, teams walk into a meeting not knowing what's expected of them. To prevent this, send out a preparation email in advance. This email should highlight key tasks completed during the exercise.

Maintain momentum; Whether you're leading peers or senior team members, remember: your role is to guide the process, not to make decisions. You're not the boss. You're the facilitator. That means keeping the discussion focused, fast-paced, and productive. If you're in the room physically, stay on your feet. Sitting—or worse, typing notes onto a projected screen—can slow things down and confuse your role. Recruit someone else to take notes so you can direct the conversation. At every moment, the team should know which step they're on and who's keeping them on track. The Twennie template helps you do this.

Keep everyone on task; facilitators must prevent the group from skipping ahead. Technical professionals want the exercise to be over quickly, so they may try to jump to the list of relevant projects. Hold the group to the process. .

Watch the clock; The session should last no more than 90 minutes—eight minutes per step and ten minutes to review the results of the prompt set. Longer sessions lead to fatigue, wasted time, and weaker win themes. If you're using a tool like Mural (or another collaboration platform), assign two note-takers. With multiple contributors placing sticky notes, the team can move more efficiently through the process.

A video goes with this exercise: Pre-RFP Business Development - Tasks that Power Lead Generation

This video walks you through the steps of the exercise and provides background on pre-RFP business development best practices.

video