## SAMPLE AGENDA FOR BID KICK-OFF MEETING

<table>
<thead>
<tr>
<th>Person</th>
<th>Subject Matter</th>
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| **Bid Manager:**              | Welcomes everyone and introduces participants if they are not known to one another.  
                                | Clarify and confirm any specific roles for the meeting.  
                                | Confirm anticipated length of meeting and the objectives to be achieved.  |
| **Senior sponsor of bid project:** | Confirms organisational (senior) commitment to project.  
                                | Confirms availability to discuss project and the provision of advice/support  
                                | Confirm appropriate resourcing.  |
| **Sales or Capture Lead:**    | Gives an overview of the project:  
                                | Customer and status of relationship with customer, including any key customer personnel who have been engaged with.  
                                | Understanding of incumbent relationship – if appropriate.  
                                | Customer’s competitive landscape.  
                                | Customer’s primary objectives and how the proposed solution will meet the objectives.  
                                | Areas of specific empathy.  
                                | Possible challenging questions.  
                                | Understanding of key win themes  |
| **Bid Manager:**              | Conducts a page turning read through of the ITT. This may include sections of the ITT which are no questions but part of an overview or pre-amble, which are pertinent to all project participants understanding.  
                                | Distribute and discuss the Bid Value Matrix (BVM), or other Bid Project Plan – pre-populated with objectives/questions, if possible.  
                                | At each juncture, the SME is appointed and agreed, with deadlines for first draft also agreed.  
                                | Any specific challenges are discussed and worked through.  
                                | Storyboarding sessions agreed (if taking place).  
                                | Project timelines and key milestones proposed and agreed.  
                                | Non-response responsibilities discussed and owners agreed (e.g. executive summary, graphics, review process/schedule/personnel, editors, proofreading)  
                                | Communications plan and further meetings schedule.  
                                | Availability of all project personnel.  |
| **Individual SME contributions:** | Each Subject Matter Expert (SME), who will be contributing content for the bid will be provided with an opportunity to discuss their role and allocated sections/questions.  
                                | Any support they require will be discussed and agreed.  
                                | SMEs will confirm their understanding of the deadlines and commit to delivery within that timeframe.  
                                | Discussions will be held about win themes and how they may link into their section of the bid.  
                                | It may be appropriate that all SMEs are not required to attend the entire meeting – but should be there for the opening and anything involving their sphere of operations.  |
| **Bid Manager:**              | AOB and contributors’ questions and closes meeting.  
                                | Confirms next meeting date.  |